

Additional Funding Student Guidance Notes

M4C has three additional funding streams, the Engagement Fund (EF), Research Development Fund (RDF) and Cohort Development Fund (CDF). The differences between the schemes are outlined below.

Engagement Fund (EF)

The Engagement Fund is available to support costs relating to engagement and professional development activities.

EF can be used to fund the following:

- Travel and accommodation costs associated with undertaking a placement or engaging with an external collaborator
- Language courses
- Specialist training and development

Please note that the EF cannot be used for subsistence costs and other living expenses that students would usually incur on a daily basis.

Applications to the EF will be devised by students with the support of the supervisory team as part of the Development Needs Analysis (DNA).

There is no limit to the number of EF applications that can be made throughout the studentship. Each application to the EF is assessed on a case by case basis and monitored closely to ensure all students have the same opportunities to apply.

The minimum amount that can be applied for is £100. While there is no set maximum for applications, if your application comes to more than £5000, you should discuss it with your side directors or directly with the M4C finance manager.

Research Development Fund (RDF)

RDF can be used by students to undertake overseas and UK study visits, fieldwork, deliver papers at conferences and to cover some primary research costs. RDF will only be allocated to activities which are essential to the completion of the student's thesis.

RDF should not be used for broader professional training and development costs as these are covered by the Engagement Fund. Nor should it be used to support costs of working with an external partner, whether as part of a Collaborative Doctoral Award or as part of a placement.

RDF can be used to fund the following:

- Attend and present at UK and overseas conferences
- UK and overseas fieldwork and study visits

Exclusions and Considerations

- Students must have the necessary visas and permissions for their programme of research, and a proper account of any health, safety and security issues must have been undertaken by the student in conjunction with their institution.
- Funded activity should not take place before the student's award has commenced (retrospective funding is not permitted)
- Funding can only be allocated to activities that are essential to the completion of the PhD thesis
- The duration of the study visit should not exceed 12 months
- It is not expected that students undertake a UK or overseas study visit in the last three months of the funded period of their AHRC award
- RDF will not be provided for students after their period of funding has ended

Please note that RDF cannot be used for subsistence costs and other living expenses that students would usually incur on a daily basis.

Applications to the RDF will be devised by students with the support of the supervisory team as part of the Development Needs Analysis (DNA).

There is no limit to the number of RDF applications that can be made throughout the studentship. Each application to the RDF is assessed on a case by case basis and monitored closely to ensure all students have the same opportunities to apply.

The minimum amount that can be applied for is £100. While there is no set maximum for applications, if your application comes to more than £5000, you should discuss it with your side directors or directly with the M4C finance manager.

If you have been awarded funding for a conference which is subsequently changed to online by the organiser and the costs reduce below £100 then the original award will still stand.

Childcare

Where a student is participating in an activity directly related to their PhD project, but which takes place outside their normal working pattern, it may be possible to claim childcare costs, particularly where a student is registered part-time. In order to meet UKRI regulations, these costs can ONLY be reimbursed when the childcare is provided by a registered childcare provider. Any claim for childcare costs should be incorporated in your EF or RDF applications where applicable and reclaimed by your institution in the usual way. We strongly advise those considering claiming childcare costs to consult with M4C in advance regarding eligibility.

Expenses Guidance

The purpose of the Research Development Fund and Engagement Fund and is to provide students with the means to carry out their research and other activities that are engaged with professional development; it may not be used for living expenses that students would usually incur or for consumables.

The list below is not exhaustive but here are some examples of ineligible items:

- Books
- Photocopying
- Poster printing
- Transcribing services
- Membership fees
- Capital equipment, including laptops, cameras and dictaphones, cameras
- Subsistence, including conference dinners
- Passports, Visa/ESTA
- Travel and medical insurance
- Claims for travel or accommodation that do not meet the criteria below:

Travel by rail and taxi

When travelling by rail you must always use standard class and will be expected to obtain the best value for money. This may mean pre-booking your tickets to travel on specific (timed) trains.

Use of taxis is not an entitlement and journeys should be made by public transport. This also applies when travelling overseas. Taxi fares may only be claimed where one of the following applies:

- no suitable public transport is available
- travelling to an unknown locality
- public transport is infrequent
- the journey is either early morning (before 6.30am) or late at night (after 10.00pm) and alternative methods of public transport are not available,
- welfare reasons and issues of personal safety.

Travel by personal vehicle

In some instances it may be more practical and cost efficient to travel using your own vehicle. If you include mileage within your funding application please use the rate that your university will reimburse you at. This may differ from institution to institution but you can clarify with your school/department if necessary.

Accommodation

Accommodation costs can be claimed where students cannot reasonably be expected to make a return journey on the same day. Repayment of overnight accommodation can be made, up to a ceiling of:

London - £120 per night

Elsewhere in UK - £100 per night

Overseas – £120 per night

The maximum amount that may be claimed towards accommodation costs is £1,680 per trip. The accommodation ceiling costs still apply to the nightly rates and any additional costs for accommodation during a trip will be subsidised by the student. Students may choose to top up the accommodation costs themselves for anything over the £1,680 limit if required.

When completing the EF/RDF application form, please calculate your required accommodation costs by using the maximum amount available to you per night multiplied by the number of nights you require, capped at £1,680. This will give you a maximum amount allowable towards accommodation costs and allow you to make bookings more flexibly once your funding application has been approved. We still expect you to obtain best value for money and if you do manage to book accommodation for less than the amount you have been awarded you do not need to notify us.

Multiple trips

If you are planning several trips related to one activity that total £100 or more, you may make one application combining all of these trips. For example, a research trip that involves visiting several archives over a two week period or longer can be made in one RDF application.

Placement specific guidance

All of the above guidance applies to placement applications with the exception that the total amount that can be claimed towards accommodation and travel costs combined is £1,680. Please note that for placements, you cannot apply for any funding until your project brief has been approved. You should submit your funding applications at least two months in advance of your proposed placement start date (see deadline schedule).

Additional information

- Copies of quotations must be provided to support any costs included in the application with the exception of accommodation.
- If there are any price increases between submitting the application and booking travel and accommodation these must be funded by the applicant. No additional funds will come from RDF or EF to make up any shortfalls after an application is approved.
- Contingency costs are not to be included within your application as they will not be accepted.
- Retrospective applications will not be considered. Please refer to the application deadline schedule for clarity on application timescales.

Overseas and UK Travel

To be eligible for M4C funding which relates to overseas and UK travel, approval to travel must be obtained from your institution before making an application for funding. You must follow the policies set out by your institution relating to travel, including completing all necessary risk assessments and following the relevant travel and accommodation booking procedures. By following these procedures, you should also be covered by your university's insurance, although we advise you to confirm this when making your travel enquiry.

Any costs relating to covid testing and quarantining at either end of an overseas trip may be included in the funding application. Please be aware that any associated costs of additional testing and isolation for unvaccinated travellers will not be covered by M4C and you will be required to fund these costs yourself.

Once you have obtained approval to travel from your institution, you can complete the funding application form. Please follow the process below for the funding application process and timescales.

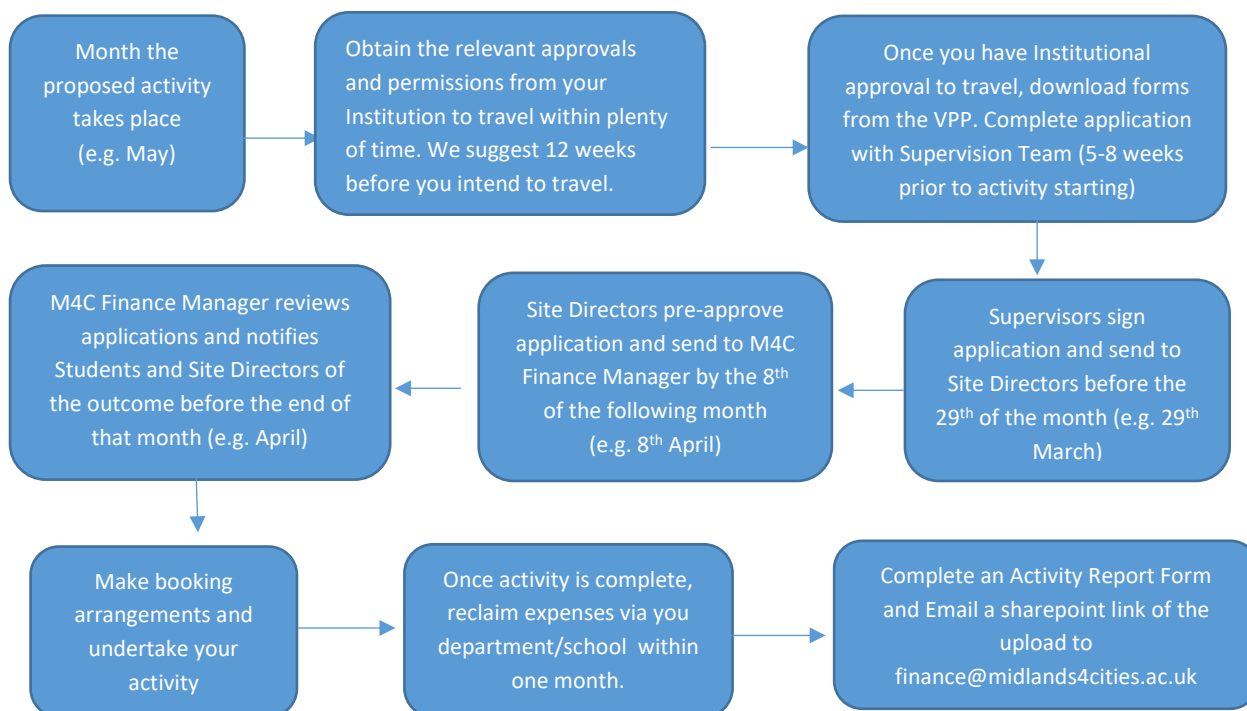
Do not make any travel or accommodation bookings or commit any expenditure for your planned trip/activity until you have received a confirmation email from the Midlands4Cities DTP Finance Manager. Until you have received confirmation that your application has been successful there is no guarantee your costs will be covered.

Funding Application Process

Applications should be submitted well in advance and as a rule of thumb you will need to start the process of obtaining approval to travel from your institution 12 weeks in advance. This will allow you plenty of time to complete your institutional travel processes before making an application for EF/RDF. **It is now a requirement that you have the relevant permissions to travel from your institution before you make an application to EF/RDF**

Once you have permission from your institution and are ready to apply for EF/RDF you should allow a minimum 5-8 weeks ahead of the proposed activity for the application process to be completed. Once you have received an email from M4C confirming your application has been successful you may start making arrangements to travel and complete any bookings via your institutions travel policies. For clarification on dates for application submissions, a deadline schedule is provided below.

An application cannot be considered if it is not within this timeframe and retrospective applications will not be considered. Please note that for placements, you cannot apply for funding until your project brief has been approved.



Engagement Fund and Research Development Fund Deadline Schedule

Month of Activity/Trip/Conference	Deadline to submit application forms to Site Directors	Site Directors submit forms to M4C Finance Manager	Latest date student notified of outcome
January	29 th November	8 th December	31 st December
February	29 th December	8 th January	31 st January
March	29 th January	8 th February	28 th February
April	28 th February	8 th March	31 st March
May	29 th March	8 th April	30 th April
June	29 th April	8 th May	31 st May
July	29 th May	8 th June	30 th June
August	29 th June	8 th July	31 st July
September	29 th July	8 th August	31 st August
October	29 th August	8 th September	30 th September
November	29 th September	8 th October	31 st October
December	29 th October	8 th November	30 th November

By submitting an application for CDF, EF or RDF (and the follow-up report on the activity as required of each award) the student agrees that Midlands4Cities may use this information for promotion and publicity e.g. as case studies on the website or within local media.

Any enquiries regarding CDF, EF or RDF guidelines should be sent to the M4C DTP Finance Manager finance@midlands4cities.ac.uk