



Tips for constructing your research budget

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- Applicants should [consult university policies](#) and Faculty guidelines on budget expenditures such as: hiring students, research personnel, equipment purchase, travel, and overhead costs/indirect costs of research.

General consideration

- Consider maximizing your budget (e.g. if \$x total or \$y/year is available, apply for it)
- Overall, lower “cost” proposals are not any more likely to be funded
- That said, may consider scaling the project/proposal appropriately so that “value” is obvious to your readers/reviewers
- We will skip quickly between agencies and programs today, and I’ll point to the examples that best illustrate certain points, but please know that most of the points are universal

Outline

- **Direct costs of research:**
 - **Budgeting for trainees and research employees**
 - Categories, and the importance of a “living wage”
 - Possibility of parental leave
 - **Balancing the proportions (field- and agency-specific)**
 - Salaries, equipment, supplies
 - Paying the PI or buying teaching remissions are typically prohibited at most Canadian agencies....but....
- **Indirect costs or Overhead:**
 - “Keeping the lights on”
 - Requesting a waiver
- **For more information....**

Categories of Research Employees (excluding postdocs)

- **Many departments and Faculties opt to pay bursaries/stipends to students, instead of navigating “employee” status**
 - Consider that this “shouldn’t” change how much you budget for certain activities, but has dramatic implications around rights, responsibilities, taxation, benefits, etc.
- That said, there are **two main categories** of research employees:
 - **TRAC** (*Teaching and Research Assistants at Concordia*) seems to be evolving into **CREW** (*Concordia Research and Education Workers’ Union – [Gazette Article](#)*)
 - For students enrolled in a credited program and in good standing.
 - **CARE** (*Concordia Association of Research Employees*)
 - For non-students being paid from research funds (exception, Postdocs).

TRAC Agreement

<https://www.concordia.ca/hr/dept/employee-labour-relations/labour-agreements-collective-bargaining/trac-ra.html>

- Eligibility:
 - A student must be enrolled in a credited program and be in good standing.
- Selection of RA:
 - RA contracts can be offered to prospective students as an incentive for enrolment or offered to a student you supervise through the completion of their degree. Otherwise, the RA position must be posted on your department website so that any student can apply.

TRAC Agreement

▪ Salaries

-Student RA's have a minimum hourly rate. The 2023 rates are estimated at (**inclusive of 10.4% benefits**):

-Undergraduate student: \$17.67 (**\$19.51**)

-Masters student: \$22.67 (**\$25.03**)

-PHD student: \$30.53 (**\$33.70**)

❖ **Please factor in salary increases each year.**

❖ Recommend budgeting a ~2.4% increase each year. (For example, next slide)

❖ There is a ~10.4% benefit charge to your grant, ontop of the funds paid to the student.

❖ **included in the highlighted amounts**

❖ No vacation is accrued for student employees.

❖ Vacation pay is included in their hourly wage.

Estimated hourly minimum costs (inclusive of benefits) over the next several years

** Subject to future collective agreements, benefits rates and your own strategic choices **

	2023 (+2.4%)	2024 (+2.4%)	2025 (+2.4%)	2026 (+2.4%)	2027 (+2.4%)	2028 (+2.4%)
Undergrad	\$19.51	\$19.98	\$20.46	\$20.95	\$21.45	\$21.97
Master's	\$25.03	\$25.63	\$26.25	\$26.88	\$27.52	\$28.18
PhD	\$33.70	\$34.51	\$35.34	\$36.19	\$37.05	\$37.94

→ Just because these are the minimums, doesn't mean you need to feel limited to these amounts. Personally, I would consider BUDGETING ~10% higher and/or budget larger increases each year.

→ How you draw up the contracts, and what/when is "actually" paid out once awarded is subject to change. And this is OK.

CARE

- Care employees can be hired under 4 categories:
 - Research Associate
 - Research Assistant
 - Support Professional
 - Support Technical

Eligibility: Anyone eligible to work in Quebec.

- Selection of CARE employee:
 - If the contract is for less than 4 months; you can offer the position to anyone.
 - If the contract is for longer than 4 months, you must post the job on your department website for 10 days.

CARE

- Salaries

CARE employees have salary scales. You cannot pay above or below the scale for the corresponding category. (+2.4%/year + 19.8% benefits)

-Research Associate	\$26.68- \$36.94
-Research Assistant	\$23.43- \$32.45
-Support Professional	\$23.43- \$32.45
-Support Technical	\$21.72- \$28.35

*rates as of June 2021

CARE

Additional expenses when hiring CARE employees.

- ❖ Please always factor in a salary increase of approximately 2.4% each June. We are currently working with June 2021 rates due to ongoing union negotiations.
- ❖ Currently, there is a 19.8% benefit charge to your grant, ontop of the paid salary
- ❖ CARE employees accrue vacation time. They must take the time off they accrue, or it is paid out from your grant when the contract is terminated.

Estimated hourly CARE ranges (inclusive of benefits) over the next several years

** Subject to future collective agreements, benefits rates and your own choices **

→ Same caveats as TRAC projection slide

	2023 (+2.4%)	2024 (+2.4%)	2025 (+2.4%)	2026 (+2.4%)	2027 (+2.4%)	2028 (+2.4%)
Research Associate	\$33.52- \$46.41	\$34.32-\$47.52	\$35.15-\$48.66	\$35.99-\$49.83	\$36.86-\$51.03	\$37.74-\$52.25
Research Assistant	\$29.44-\$40.77	\$30.15-\$41.75	\$30.87-\$42.75	\$31.61-\$43.78	\$32.37-\$44.83	\$33.15-\$45.90
Support Professional	\$29.44-\$40.77	\$30.15-\$41.75	\$30.87-\$42.75	\$31.61-\$43.78	\$32.37-\$44.83	\$33.15-\$45.90
Support Technical	\$27.29-\$35.62	\$27.94-\$36.47	\$28.62-\$37.35	\$29.30-\$38.25	\$30.01-\$39.16	\$30.73-\$40.10

THINGS TO REMEMBER

- ❖ There are two kind of research personnel:
 - Concordia students(TRAC)
 - non students (CARE)
- ❖ TRAC employees have a minimum hourly rate (but to account for increases and benefits, consider budgeting more?)
- ❖ CARE employees have a scale with a minimum and maximum hourly rate.
- ❖ Please consider budgeting a “living wage”. Even if your program/department/field typically provides minimal or no financial support to students, most agencies and programs will still view it as a valid and important part of your budget. Consider ways to actively recruit top students within this framework.
- ❖ Budget for salary increases each year (2.4% or more?)
- ❖ There are benefit costs for both of these categories.
 - ❖ For budgeting purposes, these have been included in the forecast tables on slide 8 and 12 in this deck

Helpful Links

❖ FAQ's for Hiring Research Personnel:

<https://www.concordia.ca/research/for-researchers/faq.html>

❖ The TRAC collective Agreement

<https://www.concordia.ca/hr/dept/employee-labour-relations/labour-agreements-collective-bargaining/trac-ra.html>

❖ The CARE collective Agreement

<https://www.concordia.ca/hr/dept/employee-labour-relations/labour-agreements-collective-bargaining/care-ra.html>

Start the paperwork early! Contact Victoria directly and discuss your personnel needs and how to move forward with your hiring.

Victoria Palmer- Advisor, Research Personnel
victoria.palmer@concordia.ca
514-848-2424 ext 8761

Postdoctoral research fellows

VPRGS-4 (link to policy) and Guidelines

- 0-5 years post-PhD degree
- Normally 1-3 years in duration
- Teaching and other responsibilities (remunerated separately)

- **Minimum \$30k/year + Benefits (19.8%) = \$35,940**
- For budgeting, **consider at least ~45-60k** so that you are in a position to pay a competitive salary (depending on your field)
 - Postdocs are still eligible to receive their own fellowships (which may reduce your own obligation)
 - CIHR will often trim ~20-25% off your budget, so you also want to protect yourself, so you have a useful amount “left”

Please consider contacting Niyusha directly to discuss...

**Niyusha Samadi,
Coordinator, Postdoctoral Development**

sgs.postdocs@concordia.ca

514-848-2424 ext 3156

[Bookings link \(Wednesdays\)](#)

Parental leave (TAGFA link for students and postdocs paid from tri-agency funds)

The Agencies will provide maternity/parental leave supplements within 12 months following a child's birth or adoption to eligible students and postdoctoral fellows who are paid out of agency grants and who are the child's primary caregivers. The **supplement** paid to the grant recipient will be based on the students' and/or postdoctoral fellows' current salary/stipend from the grant for up to 12 months to cover the leave period.

If both parents are supported by grant funds, each parent may take a portion of the leave for a combined maximum of 12 months. The supplement will be pro-rated if the student or postdoctoral fellow is being trained in research on a part-time basis.

The administering institution is responsible for submitting a request for paid maternity/parental leave supplements to students and postdoctoral fellows by completing the Grant Amendment Form for the relevant agency's approval.

At Concordia, please reach out to Cynthia Raso (Cynthia.raso@concordia.ca) to initiate this process who will work with Andrea Rodney to facilitate the Grant Amendment Form

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Balancing the proportions

- The majority of governmental programs will “expect” a clear majority of funds (60-85%) going to “training”
 - Funds to support students, postdocs, and “HQP”
- That said, certain programs are focused on equipment or other cost categories (e.g. NSERC RTI and SSHRC Connection Grants) where this might not be the case
- Field specific differences also exist, where the other “research” costs (e.g. experimental costs) can be higher or lower and nudge the % up or down

Paying the PI or buying teaching remissions are typically prohibited by most Canadian agencies....but....

- Whenever you find an agency (e.g. NIH) that allows you to pay yourself we must abide by section 24 of CUFA

Outside Employment

- **24.06** A member shall not devote more than one (1) day equivalent per week to outside employment in any academic year.
- **24.07** The member shall obtain prior written approval from the Dean. A copy of the member's request and of the decision shall be sent to the academic unit head, and to the Association. For requests involving more than six (6) days of time commitment, the Dean shall consult the academic unit head for advice on the potential impact of the outside employment on the academic unit and shall consider the relationship of the proposed employment to the member's area of specialization or expertise. In cases where such prior approval cannot be reasonably obtained, a member may nevertheless agree to undertake outside employment of up to three (3) days provided that the provisions of Article 24.01 b) are complied with and that the above-mentioned authorization is sought within two (2) days. The Dean's approval shall not be denied without a valid reason, and will normally be given within ten (10) days of the request.

Teaching remissions

- Most often, impossible to budget into your grants
 - Occasionally an indirect condition of the application though (e.g. minimum % research)
- More commonly related to the institutional commitment(s) supporting the application (e.g. if you are the lead on a large team grant or applying for a salary award that requires a certain % research)
- Needs to be negotiated (Advisors, Research Development can facilitate, but this conversation is between you, your Department, and Faculty)

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Indirect costs or overhead

VPRGS-1 and associated handbook

- **Unless you have a waiver, you need to budget the full amount allowed by the agency or program**
- For most FRQ and tri-agency programs, these costs are dealt with automatically (no additional steps or budget required)
- NFRF has indirect costs budgeted IN the proposal itself (up to 25%)
- All other agencies, institutional expectation is that you budget what is allowed by their program and/or request the difference be waived (speak with your advisor)
- Overhead/Indirect waivers
 - Increasingly need to be able to cite the agency rule that prohibits or limits the payment of overhead
 - Need to be approved by the Faculty and OVPRGS

Overhead Rates (Handbook)

Type of Activity/Agreement	Sponsor	On-Campus [▲] Rate	Off-Campus [★] Rate
Contract Research	Industry	40% of TDC †	20% of TDC †
	Federal Government (PWGSC)	65% of Salaries & Employee Benefits + 2% of travel costs	30% of Salaries & Employee Benefits + 2% of travel costs
Service	Any	20% of TDC †	N/A
Consulting	Any	10% of TDC †	N/A
Sub-Grant, Co-Grant or Negotiated Grant	Any	15% of TDC †	N/A
Contribution Agreements	Federal or Provincial Government	15% of TDC †	N/A

Current rates (OOR101), but please speak with your advisor to help navigate this table on a case by case basis

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Contacts – Office of Research

- <https://www.concordia.ca/offices/oor/contact.html#resdev>
- Research and Business Development
- Advisors, Research Development (depending on your Department)
 - jessica.safarian@concordia.ca
 - lauren.segall@concordia.ca
 - marjan.shayegan@concordia.ca
 - michele.kaplan@concordia.ca
 - rebekah.thompson@concordia.ca
- dominique.michaud@concordia.ca and/or michael.verwey@concordia.ca,
(as needed)

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