



## NORTH WEST DOCTORAL TRAINING CENTRE

### Research Training Support Grant (RTSG) Guidance (Updated July 2017)

What is RTSG? _____	Page 2
Who can claim RTSG funding? _____	Page 2
How is RTSG claimed? _____	Page 2
What can RTSG be used for? _____	Page 3
Methodological training courses _____	Page 4
Language training courses _____	Page 4
Travel to CASE partners and for co-supervision _____	Page 4
Travel for NWDTC/ESRC Events _____	Page 5
UK and Overseas Conferences and Summer Schools _____	Page 5
UK Fieldwork Expenses _____	Page 5
Fieldwork and survey costs _____	Page 6
Books _____	Page 6
Reimbursement of assistants, including transcription services _____	Page 6
Payment of participants _____	Page 6
Small items of equipment _____	Page 6
Computer equipment _____	Page 7
Foreign Currency _____	Page 7
Mileage _____	Page 7
Appendix 1 _____	Page 8
Appendix 2 _____	Page 9

## What is RTSG?

RTSG is the Research Training Support Grant, from which NWDTC-funded students can claim research expenses. This allowance is intended to be used to pay for expenses which the student, supervisor and NWDTC deem to be in direct support of a student's research.

The fund is pooled centrally and administered by the central NWDTC Office. **There is not a ring-fenced allowance per student.**

Please note that this document concerns RTSG funding for NWDTC students who commenced their funded programmes after September 2013. Students who started before this should contact their local School/Faculty Finance office directly with claims and queries.

## Who can claim RTSG funding?

Any NWDTC-funded student is eligible to claim expenses from RTSG, at both master's and doctoral level. This includes part-time and fees only award holders. Individual kinds of expenses which carry a cap per annum should be adjusted pro rata for part-time students.

RTSG funding cannot be claimed for expenses that occur prior to studentships commencing, and cannot be claimed for expenses that are incurred/events that take place after the **studentship** ends. If you take an unfunded writing up year, you will not be eligible to claim RTSG expenses during this year.

## How is RTSG claimed?

RTSG expenses work by reimbursement. This means the student makes the purchases or payments initially, then reclaims the expense from the central NWDTC Office. The only exceptions to the reimbursement process are outlined in Appendices 1 and 2.

To reclaim eligible expenses, students should complete the [RTSG Form](#) in full and have this signed by their supervisor. The supervisory signature is to confirm that the expense is necessary and crucial to the development of the student's research or training development. **By signing the form, the supervisor is also confirming that the activity took place as detailed.**

Students can apply for several reimbursements on one form: it is not necessary to complete a new form for each claim. Please copy and paste the table in Question 2 if you are claiming for more than three expenses.

Evidence of purchase must be provided for each item on the claim form. Original VAT receipts must be attached for all equipment/book purchases. Original tickets must be submitted for all train, bus or taxi travel – scans or booking confirmations are not acceptable. Print-at-home

tickets are acceptable, and advisable if you are concerned about ticket barriers retaining your tickets.

Bank statements are not sufficient proof of purchase, and will only be accepted in exceptional circumstances (i.e. when no other proof of purchase was possible).

Please send the completed application, with receipts, to the central NWDTC Office at:  
Room G065  
1-7 Abercromby Square  
Liverpool  
L69 7WY

Claims can be submitted by email to [nwdtc@liv.ac.uk](mailto:nwdtc@liv.ac.uk) instead, if there is no hard copy evidence that has to be posted. **Please do not submit the same claim by email and post.**

There are two RTSG Claim deadlines a month – the 15<sup>th</sup> and the 28<sup>th</sup> (or the next nearest working day). It will take up to four weeks for payment to be received.

**Any incomplete claims (i.e. claims which do not provide sufficient detail, are unsigned or which do not include all the necessary evidence) will be automatically pushed back to the next deadline while the office chases up the missing information. This is to avoid delays in payment for other students.**

## What can RTSG be used for?

The following are eligible expenses for RTSG support:

- Methodological training courses
- Language training courses (usually undertaken to support overseas fieldwork)
- Travel to CASE partners and for co-supervision
- Travel for NWDTC/ESRC Events
- UK, EU and overseas conferences and summer schools
- UK Fieldwork Expenses and supplementing overseas fieldwork expenses
- Fieldwork and survey costs, e.g. printing, stationery, telephone calls
- Purchasing inter-library loans / essential research texts that are otherwise unavailable
- Reimbursement of assistants, including transcription services
- Payment of participants / Gifts for local informants
- Purchasing small items of equipment e.g. cameras, dictaphones, films, memory cards
- In certain circumstances, the purchase of a new laptop or tablet

Further specifics can be found below.

While we have attempted to include all likely expenses in the RTSG guidance, this list is not to be considered exhaustive. Please email [nwdtc@liverpool.ac.uk](mailto:nwdtc@liverpool.ac.uk) with an eligibility queries, providing as much detail as possible.

## Methodological training courses

RTSG can support the cost of any methodological training required by NWDTC-funded students. This includes course registration, travel and accommodation costs associated with training. There is no limit on the amount that can be claimed for this purpose. Training should be undertaken in the UK, unless this is unavailable. There is no cap on this type of expense.

Please include on the RTSG Form:

- The date, location and title of the training
- A brief statement regarding why this training was needed

## Language training courses

RTSG can support the cost of language training required by NWDTC-funded students. This must directly relate to the student's research project and would usually be undertaken to support overseas fieldwork. Language courses taken purely for personal skills development will not be funded. The cost of course registration and travel to attend the course can be reclaimed. There is no cap on this type of expense.

Please include on the RTSG Form:

- The date(s), location and nature of the language course
- A brief statement regarding why this language training is needed

Students undertaking Difficult Language Training (DLT) to support their fieldwork project may be eligible to apply for an extension to their studentship. Please see the [Overseas Fieldwork Funding Guide](#) for more information.

## Travel to CASE partners and for co-supervision

RTSG can support the cost of travel for students who are undertaking a CASE studentship (where they may be required to travel to the CASE partner organisation) or who are co-supervised across institutions (where they may be required to travel to partner institutions for supervisory meetings). There is no cap on this type of expense, but travel should always be by the most economical means possible.

Please include on the RTSG Form:

- The date(s), location and purpose of the meeting

Students cannot reclaim expenses for the cost of travelling to supervisory meetings at their home institution, even if they live away from campus in another city.

In some CASE Studentship Formal Agreements, arrangements will have been made for the non-HEI partner to cover the cost of travel expenses. In these circumstances, claims should be made to the non-HEI partner and not to the NWDTC.

## Travel for NWDTC/ESRC Events

RTSG can support the cost of travel for attendance at NWDTC / ESRC Events. This includes attendance at compulsory NWDTC events, attendance at ESRC Training events (e.g. [ESRC Media Training](#)) or events taking place through Methods North West. If the event takes place outside of the North West, then accommodation costs may also be eligible. There is no cap on this type of expense, but travel should always be by the most economical means possible.

Please include on the RTSG Form:

- The date(s), location and purpose of the event

## UK, EU and overseas conferences and summer schools

RTSG can support the cost of travel, accommodation and registration for UK and overseas conferences. There is a limit of £750 per year per student for conference attendance. There can be some flexibility around this, whereby you can claim more than £750 in one year, on the understanding that it might impact the level of reimbursement you can claim in the following year. It is down to students, in liaison with their supervisors, to discuss how best to prioritise conference attendance.

Please include on the RTSG Form:

- The date, location and title of the conference

There is the possibility of applying in advance for funding towards attendance at a conference, if the conference is overseas, will cost more than £500 in total and if you will be presenting a paper or poster at the conference. Please see Appendix 1 for more details. Under all other circumstances, payment for conference attendance will only work via the usual reimbursement process.

## UK Fieldwork Expenses and supplementing overseas fieldwork expenses

Students undertaking fieldwork in the UK cannot apply to the NWDTC Overseas Fieldwork Fund, but can reclaim costs from RTSG. This may include travel and accommodation expenses, as well as survey expenses (please see the next section below). There is no cap on this type of expense, but travel should always be by the most economical means possible.

Please include on the RTSG Form:

- A brief few lines outlining the fieldwork activity
- The date and location of the work that took place

## Fieldwork and survey costs

RTSG can support the costs associated with fieldwork, surveys or work with participants. This may include printing, stationery or pay-as-you-go telephone calls.

Please include on the RTSG Form:

- The date and nature of the work that took place
- A brief statement regarding how the printing, stationery etc. was used

**The cost of stationery will not be reimbursed in any other circumstances.**

## Books

RTSG can support the cost of inter-library loans for unavailable texts or, if this is not possible, RTSG can be used to purchase essential research texts.

Please include on the RTSG Form:

- The title of the book
- A brief statement regarding why the text is crucial and why it can't be accessed through the library or inter-library loan system.

## Reimbursement of assistants, including transcription services

RTSG can support the payment of interpreters, guides, transcription services or other specialists. Please see Appendix 2 for more details.

## Payment of participants

RTSG can be used to pay research participants. Please see Appendix 2 for more details.

## Purchasing small items of equipment

RTSG can support the cost of buying small items of equipment such as cameras, dictaphones and external hard drives. There is a cap of £50 per item on equipment purchases. If you need to purchase a more expensive piece of equipment, please email the NWDTTC account to make a case **prior to purchase**.

Please include on the RTSG Form:

- The nature of the equipment and why it is needed
- Confirmation that you have investigated the availability of the equipment for loan in your department or school

## Computer equipment

In exceptional circumstances, the NWDTC may consider requests from students to purchase a laptop, tablet or PC from RTSG funds.

If a student wishes to apply for funding towards a computer, it is expected that they will make a case for support **prior to purchase**, justifying the purchase of a computer with RTSG money beyond the need to simply type up the thesis. This may be the need to use a particular kind of software for their project, or the need to travel for fieldwork or to see collaborative partners.

If approved, the student can claim reimbursement of up to £300 towards the computer using the RTSG Form as usual. Students can, of course, purchase a more expensive laptop and cover any expense above the £300 themselves.

Only one claim for computer equipment can be made during the course of the studentship. Students are responsible for the upkeep of the equipment and any cost associated with this. Repairs to computer equipment, whether purchased through RTSG or not, are not eligible.

## Foreign Currency

When expenses are in currency other than pounds sterling, the amount of reimbursement in pounds sterling will be calculated using the [XE Currency Exchange](#), using the exchange rate **on the day the claim is processed**.

If there is a reason to believe that a student will be unfairly reimbursed due to the exchange rate on the day of processing (e.g. if they are undertaking fieldwork in a country with economic difficulties) the student will need to provide additional proof of the exchange rate on the day of purchase.

## Mileage

Mileage can be reclaimed at a rate of 45p per mile. Please provide the start and end postcodes for your journey. The mileage will then be calculated by the NWDTC Office using the [AA Mileage Calculator](#).

## Appendix 1: Applying for funding towards conference attendance in advance

Under specific circumstances, NWDTC students can claim for funding towards conference attendance in advance. The criteria is as follows:

- The conference must be taking place outside of the UK
- You must be presenting a paper or a poster at the conference
- The total cost of the conference (registration, accommodation and travel) must be in excess of £500

Any claims that do not fit all three of the above criteria must go through the usual reimbursement process outlined above.

To apply for conference funding in advance, please email [nwdtc@liv.ac.uk](mailto:nwdtc@liv.ac.uk) providing:

1. The title, date and location of the conference
2. A brief statement about why the conference is relevant for your research
3. Your accepted abstract for the paper or poster
4. A costing for attendance (registration fee, travel costs and accommodation expenses).

Please note that conference expenses claimed through this route should still adhere to the overall cap on conference/summer school expenses. As noted above, this is £750 per year per student. There can be some flexibility around this, whereby you can claim more than £750 in one year, on the understanding that it might impact the level of reimbursement you can claim in the following year. It is down to students, in liaison with their supervisors, to discuss how best to prioritise conference attendance.

Requests can be submitted at any time. Where requests are successful, the payment will be processed alongside the next batch of standard RTSG claims. Therefore, please be aware that it may take up to four weeks for the payment to be received after approval.



## Appendix 2: Payment of Individuals/Companies supporting research

This appendix refers to the payment of

- Transcription Services
- Interpreters
- Local guides
- Research Participants
- Gifts for local informants

When RTSG is being used for payment of an individual or company for services rendered, or for paying participants in research, this can be paid by the student's institution in the first instance – as opposed to by the student themselves – and then the institution will reclaim the expenses from the NWDTC.

Students need to apply for this in advance and, if approved, the NWDTC Office will liaise directly with institutions to make arrangements. Students will need to follow local departmental processes for booking the required services and making payments.

### **Transcription Services**

Students should email [nwdtc@liv.ac.uk](mailto:nwdtc@liv.ac.uk) and outline the nature of the transcription work to be undertaken, and the cost including the rate per minute. Transcription rates should usually not be more than £1 per minute. Supervisors or your local department will be advise on the best choice of transcription service for your discipline. The NWDTC can support a maximum of £1500 in total towards transcription for an individual student's doctoral project.

### **Payment of Interpreters/Guides/Other Specialists**

When undertaking UK or Overseas fieldwork, it may be necessary to hire assistants to support your work. At least two different quotes should be considered and a case emailed to [nwdtc@liv.ac.uk](mailto:nwdtc@liv.ac.uk) for approval prior to appointment, which includes details of the work required and the two quotes considered.

In some circumstances, it may not be possible for your institution to directly pay assistants during overseas fieldwork. In those cases, the student may need to pay the assistant initially and claim back from the NWDTC via the usual reimbursement process, but a case still needs to be made in advance.

### **Payment of Research Participants / Gifts for local informants**

Students should email [nwdtc@liv.ac.uk](mailto:nwdtc@liv.ac.uk) and outline the purpose and total cost of the proposed research project, including the rate of pay per participant and the number of participants. Payment rates should be in line with local departmental guidance, which supervisors should be able to confirm. The NWDTC can support a maximum of £1000 for an individual student's doctoral project. Students can seek additional funding from other sources, and again supervisors will be placed to advise upon this.