ARC Continuous Linkage - Travel Budget Advice

There are two areas to budget for travel in the RMS budget table- **'Travel'** and **'Fieldwork Expenses'**.

ARC Budget Limits: The total <u>travel</u> costs for your project may not exceed an average of $20,000 per year. Costs related to carrying out fieldwork are NOT counted towards the limit and should be requested under 'Fieldwork Expenses'.

Important Notes:

‒ **In the updated 2017 Instructions for Applicants, the ARC has highlighted the need for a full justification on any domestic and international travel for CIs, PIs and research support personnel. Justification must still be provided where the travel is to foster and strengthen collaborations between participants in Australia and overseas.**

‒ Outline costs clearly, including the origins, destinations and number of days where appropriate.

‒ Detail each individual case of travel/fieldwork as a different line item, breaking down the costs. For example, do not group trips to separate conferences under the single heading, 'Conference Travel'.

‒ Travel must be essential to the project and be fully justified in the "Justification of funding requested from the ARC" section of your application.

‒ For pricing airfares, you can source information from online sites such as <u>Expedia</u>, <u>Webjet</u>, <u>Qantas</u>, <u>Virgin</u>, or for multi destination trips, a quote from a local travel agent such as <u>Flight Centre</u>. It is also acceptable to speak to the school administrator who normally organises travel for your school.

- Use the <u>2016/2017 ATO rates</u> to determine appropriate per diem/accommodation amounts to budget for *(also see 'Notes if requesting less than the ATO/UNSW rate').*

General Travel (the 'Travel' section of the Budget)

Examples of costs that can be included under this category:

✓ Domestic and/or international airfares (economy)

✓ Accommodation and incidentals (per diems)

✓ Other travel related items (such as reasonable local travel within country – e.g. airport transfers, airport buses/trains, taxis, etc.)

The purposes for the above travel can include:

✓ Conference travel *- see 'Conference Travel' section on page 2*

✓ Research collaboration- *see 'Collaboration Travel' section on pages 2-3*

Who is eligible to request travel costs?

✓ Funding is permitted for CIs, PIs, Higher Degree by Research Candidates, Postdoctoral Fellows and research support personnel <u>working on the project</u>. Where the funding is provided by UNSW or the Partner Organisation, this would be considered a cash contribution.

✘ Other personnel <u>not working on the project</u> (such as a keynote speaker) cannot request travel funding.

✓ Funding is permitted for overseas-based PIs and other personnel working on your project to travel to destinations other than Australia.

Conference Travel (the 'Travel' section of the Budget)

Conference travel is an eligible item. You can ask for flights, accommodation, registration and a per diem. Conference travel has to be **very well justified** and informal feedback suggests international travel (particularly conference attendance) is the first place the ARC looks when reducing budgets.

Some Faculties provide a conference budget for researchers. If making use of this, it can be included in the budget table as it would be considered a cash contribution. Partner Organisations may also contribute to the costs of travel and again, this would be considered a cash contribution.

Conference Travel should be described in '**Research Environment'** in the Project Description (outline the plans for communicating research results, including scholarly and public communication and dissemination).

Conference Travel should appear in the budget table with each individual expenditure item detailed:
> *Airfares-Sydney/USA-CI (Name)-ICIAM Conference $2,800*
> *Accommodation-USA-CI (Name)-6 days @ $200 per day-ICIAM Conference $1,200*
> *Per Diem-USA-CI (Name)-6 days @ $120 per day-ICIAM Conference $720*
> *Registration-CI (name)-ICIAM Conference $6,000*

If requesting conference travel from the ARC, some things to make clear in your Justification include:
− The standing of the conference
− The audience/participants of the conference
− Benefits/importance to the project in attending that particular conference
− Why actual attendance is better than a cheaper alternative that doesn't involve travel
− What additional activities you may be able to undertake in conjunction (meeting with other experts in the research field, side-trip to a University specialising in that research area, etc.)
− Any direct publication outputs as a result of the conference (i.e. a paper) and who will receive this
− Your role in the conference and the significance of that, for example, will you be submitting a paper or presenting a poster as a way to disseminate research results?

Collaboration Travel (the 'Travel' section of the Budget)

Collaboration travel is for you to visit various members of your team and vice-versa. This kind of activity should be detailed in the relevant section of your **Project Description**.

✓ Funding is permitted for any member of your team (named and non-named personnel) working on the project.
✓ In Linkage, it would be reasonable for the Partner Organisation to contribute to travel for Partner Investigators as part of their cash contribution.

Collaboration Travel should appear in the budget table with each individual expenditure item detailed:
> *Melbourne Research Assistant - Training Visit (Airfare; Melbourne – Sydney Return)- $280*
> *Melbourne Research Assistant - Training Visit (Accommodation; 4 nights @$183/night)- $732*
> *Melbourne Research Assistant - Training Visit (Meals & Incidentals; 5 days @119/day)- $595*
> *Airfares Brisbane/Sydney Return - PI (Name), 3 per annum @ $311= $933*
> *Accommodation Sydney - PI (Name) 3 days @$225 per day = $675*
> *Per diem Sydney - PI (Name) 6 days @$138 per day = $828*

If requesting collaboration travel from the ARC, some things to make clear in your Justification include:

– Why is the collaboration essential to the project- i.e. why are you doing it?
– Why have you chosen this method of collaboration (i.e. face to face meetings) and not another?

Reasons for face-to-face collaboration may include:

– Expert knowledge sharing, such as training project personnel (including PhD students) in performing specific experiments, participant surveys or lab work
– Workshopping the design of experiments
– Clarifying issues with formulation of research problems
– Reviewing analytical results
– Undertaking sub-studies
– Presentation and discussion of results
– Planning for dissemination or policy design

If you are also using methods of collaboration that do not require travel; you can incorporate this in your Justification to show where alternatives have been utilised where appropriate, for example:

"Regular project planning and update meetings will be conducted via teleconference. The project team will also meet face to face once per year to undertake (project activities) and to ensure that each project activity is coherently informed by the views and experiences of the whole research team."

If requesting travel <u>for non-named personnel from the ARC</u>, making an especially clear case is vital:

– What unique expertise does this person offer that cannot be obtained locally?
– Why does this person need to travel, as opposed to other methods of interaction/collaboration?

Example Justification for non-named personnel travel:

"(Name) is an essential intellect contributor for this project. She is an expert on (name specific area of expertise) and has more than (number) years' experience managing large and multi-disciplinary projects, including collaborations with (group) to (tasks performed). It is essential, therefore, for (Name) to travel to Australia to liaise with the CIs and PIs. She has participated in multiple (similar field related to this proposal) projects in Europe and will be a crucial link in the communication between researchers and (group) involved in this project."

Where measures have been taken to minimise the expense of travel for non-named personnel, this again should be detailed in the justification, for example:

"A request is made for the ARC to support the travel of the two external members of the Project Research Group (Name 1, Name 2) from their home institutions to Sydney in years 1 and 3. The timing of the meetings will be set so that both external participants will be able to travel to and from Sydney in a single day, avoiding the need to pay for overnight accommodation. Travel costs have been taken from the (airline) website and conform to the ARC and ATO requirements as recommended by the University. This request forms part of the (area of project) strategy that will ensure that (result of collaboration). All other travel costs will be met from the cash contributions being provided by the POs."

Fieldwork Travel (the 'Fieldwork Expenses' section of the Budget)

What is defined as 'Field Research'?

'Field Research' means the collection of information integral to the Project outside a laboratory, library or workplace setting and often in a location external to the researcher's normal place of employment.

If you are able to justify the necessity for the work in relation to the proposed Project, and the Administering Organisation (i.e. UNSW) can certify the work undertaken, then it can be considered as 'Field Research'. It is at UNSW's discretion to consider what is determined as 'Field Research'.

The main purpose of any travel designated as Field Research must be to carry out the research, not to attend a conference or other related meetings. Fieldwork can include visiting/making use of unique/specialised facilities in Australia or overseas that are not available locally (e.g. archives or specialised libraries) for the purpose of completing your research.

Examples of costs that can be included under this category:
− International and domestic travel costs to the fieldwork site
− Accommodation and living costs for fieldwork
− Other fieldwork related items (e.g. technical or logistical support, car hire etc.)

Who is eligible to request Fieldwork costs?
− Funding is permitted for CIs, PIs, Higher Degree by Research Candidates, Postdoctoral Fellows and research support personnel involved in carrying out field or survey research.

Need Support Staff? Research, technical and logistical support staff required to assist with field research may be requested under "Personnel" in the Budget. Salary support for these staff is an allowable item.

Other Important Notes:
− Where the funding for field or survey research is provided by UNSW or the Partner Organisation, this would be considered a cash contribution.
− Costs related to carrying out field research are not considered as general travel and therefore the $20,000 average per year limit does NOT apply to these costs.

Notes if requesting less than the ATO/UNSW Rate:

If you have previous experience researching in a particular location and are confident that your accommodation and per diem rates will be below the standard ATO/UNSW rates, it is important to reference your experience when justifying the (lower) rates you have requested. This not only strengthens your case for the project being 'value for money', but adds to the idea of your track record and hands-on knowledge in this research area.

For example: *"The accommodation (10 days at $XXX per day) and per diem rates (10 days at $XXX per day) requested for my fieldwork travel to XXX are based on my extensive experience working and living in this location whilst collecting sample data for XXX, and are significantly lower than the ATO published rate of $XXX for this region."*