



## **SABBATICAL RESEARCH GRANT IN LIEU OF SALARY FAQ**

### **1. Who is eligible to apply for the Sabbatical Research Grant?**

- All WUFA members earning a salary who have research as a requirement of their role, and who have research in their approved sabbatical plan may apply.

### **2. How can I apply for the Sabbatical Research Grant?**

To apply for the Sabbatical Research Grant, you must complete and submit the Sabbatical Research Grant Application Form (will add link once updated). Follow these steps:

- Review Eligibility Requirements: Ensure that your proposed research aligns with the guidelines and objectives of the grant. The project must be directly tied to your approved sabbatical leave plan and comply with Canada Revenue Agency (CRA) requirements.
- Prepare Supporting Documentation: Gather all necessary documents, including your sabbatical leave approval, detailed research proposal, and budget outline.
- Complete the Application Form: Fill out all sections of the form carefully, providing clear and concise information about your research objectives, methods, and anticipated outcomes.
- Submit the Application: Submit your completed application form and supporting documents. Ensure your submission is made well in advance of your sabbatical start date.

### **3. Where do the funds come from?**

The funds are sourced from your salary. When you apply for and receive the grant, it is essentially a reallocation of a portion of your earnings to support your research activities. You may request them as:

- A lump sum (one or two payments).
- Incremental payments added to each pay period during the grant term.

### **4. What is the benefit of applying for a Sabbatical Research Grant?**

Please check with your financial advisor. UWindsor Payroll does not give tax advice, so you will need to speak to your financial advisor to confirm if there is a benefit to you. Please note that the grant may reduce the taxes and Canada Pension Plan (CPP) because grant income is not taxable. If you need to make a large payment in advance (for example for travel) the ability to receive the funds as lump sum may be advantageous to avoid interest.

### **5. Where will I see the grant funds?**

You will see it on your payroll statement. Payroll includes the income from the grant when you receive it and will also show the equivalent recovery from your salary to cover the grant. You should also see a change in your T4 amounts for employment and T4A for the portion that is a research grant.

**6. What projects can I apply for?**

The project must align with the primary purpose of the sabbatical and research grant. Revenue Canada Agency has identified the following conditions for eligibility for the Research Grants Program:

1. The University will benefit from the research.
2. The activity is timely and appropriate for the field of interest of the researcher.
3. The amounts requested in the budget appear reasonable and justifiable.
4. The research must be specific in nature and involve a critical or scientific inquiry, having for its aim the discovery of new facts and their correct interpretation or their practical applications.

**7. Can I apply for the Sabbatical Research Grant before my sabbatical is approved?**

No, your sabbatical must be approved before you can apply for the Sabbatical Research Grant. The grant application must align with the approved timeframe of your sabbatical leave.

However, it is recommended that you submit your grant application as soon as your sabbatical is approved and well before your sabbatical start date. This ensures the grant is processed and available during your sabbatical period.

**8. Can I apply for the grant after my sabbatical has already started?**

Yes. While applications should be submitted prior to the start date of the sabbatical leave, it is possible to apply after the sabbatical has started, however, the timeline for repayment would be shortened and repayment must occur prior to the end of the sabbatical leave.

**9. How much funding can I apply for through the grant?**

The normal range of request is \$1,000 to \$20,000. The maximum amount you can request is determined by your salary during the sabbatical period. The requested funds cannot exceed your salary, while ensuring that sufficient funds remain to cover your required payroll deductions (such as benefits, CPP, EI, and any other mandatory contributions).

To ensure accuracy and compliance with the CRA and payroll regulations, consult a financial advisor to determine the optimal amount to request, and assess how it may impact your overall income, taxes, and contributions during and after the sabbatical period. For exact calculations and recommendations tailored to your salary, reach out to Payroll ([payroll@uwindor.ca](mailto:payroll@uwindor.ca)) for additional assistance. Usually, the absolute minimum would be 14% for source reduction and vacation coverage must be left. It is generally recommended that the amount be substantially less.

**10. What types of research projects are eligible for this grant?**

Those approved by your sabbatical plan only – and those that meet the listed options and conditions in the application form as defined by Revenue Canada.

**11. Can I apply for this grant if I am only taking a 6-month sabbatical?**

Yes, you can apply for the Sabbatical Research Grant even if you are taking a partial 6-month

sabbatical.

**12. Do I have to repay the grant in full to another office?**

No, the Sabbatical Research Grant does not require repayment to another office, because the funds come directly from your salary. When you apply for and receive the grant, it is essentially a reallocation of a portion of your earnings to support your research activities.

**13. When will I need to repay the grant?**

You do not need to repay the grant, as it is funded directly from your salary, and comes out of your salary directly.

**14. Who determines my eligibility for the Sabbatical Research Grant?**

All WUFA members earning a salary who have research as a requirement of their role, and who have research in their approved sabbatical plan may apply. Those people applying for the grant must have approval of their AAU Head and the Dean of their Faculty. They submit an application to the Office of the Provost and Vice-President, Academic. This application requires peer review, which is conducted by a review committee.

**15. Will I save money by using this grant?**

The potential to save money through the Sabbatical Research Grant depends on your individual financial circumstances. (Please see FAQ 4).

**16. Can I use the grant to hire research assistants or other staff?**

Yes, please see the steps below if you wish to utilize University's payroll services to hire Research Personnel with their Sabbatical Research Grant:

1. The Researcher would sign off on the [authorization memo](#) agreeing to the terms.
2. The Researcher would submit an ERSO record for a Research Grant Account to be created for the cost of the Research Personnel Contract + 20%.
3. The Researcher would transfer the University of Windsor the funds as noted in step #2. The funds can be transferred to the University of Windsor using any of the following 3 options:
  - a. A cheque written to the University of Windsor (please note the ERSO or Grant Number in the memo of the cheque)
  - b. An electronic funds transfer (the University's bank information can be found [here](#))
  - c. An E-Transfer to [areetransfers@uwindsor.ca](mailto:areetransfers@uwindsor.ca) (depending on your banking restrictions, you may need to request an increase to the transaction limit from your bank).
4. The paperwork can then be submitted to hire the [Research Personnel](#).
5. After the Research Personnel has been paid, the remaining balance in the account will be distributed according to the overhead policy.

**17. Can I use the grant to purchase equipment for my research?**

Yes, you can use the Sabbatical Research Grant to purchase equipment necessary for your research. However, it is essential to keep all receipts for these purchases, as they will be required

for tax purposes. The Canada Revenue Agency (CRA) mandates that eligible research expenses must be documented to claim them as deductions against the grant income.

The grant application form states “The grant will be treated as T4A income for tax purposes and accordingly will not have income tax deducted by the University. It is the responsibility of the grantee to report the T4A income and to claim eligible research expenses as a deduction against the grant when the annual income tax return is filed. [Revenue Canada’s Income Tax Folio S1-F2-C3: Scholarships, Research Grants and Other Education Assistance \(issued 2013-03-28\)](#), which replaced the CRA Interpretation Bulletin IT-75R4 provides some guidance with respect to the types of research expenses that may be deducted against T4A grant income.”

**18. Can I use the grant to cover travel expenses for academic conferences or events?**

Yes, all receipts must be kept for this purpose. as above

**19. Can I use the grant to attend non-academic conferences or events related to my research?**

Yes, you can use the grant to attend non-academic conferences or events, provided they are directly related to your research and approved as part of the sabbatical plan. This includes industry events, workshops, or other gatherings that contribute to the advancement of your research objectives or professional development. Be sure to maintain detailed documentation of how these events support your research goals. Additionally, all receipts and proof of attendance must be kept and submitted as part of the grant reporting requirements.

**20. Can I use this grant for personal development activities that support my research (e.g., workshops or training)?**

Yes, the grant can be used for personal development activities that support your research, such as workshops, training sessions, or skill-building programs. These activities should directly contribute to enhancing your research capabilities, knowledge, or methodologies, as articulated in the sabbatical plan. Be sure to select activities aligned with your research goals and objectives and document their relevance in your grant reporting. Additionally, all receipts and any supporting documentation, such as proof of enrollment or completion certificates, must be retained and submitted in accordance with the grant's reporting requirements.

**21. What happens if my sabbatical is extended? Can I apply for more funding?**

Yes, as long as it is applied for, received and covered during the sabbatical, within the limits described above.

**22. What documentation do I need to provide to claim research expenses against the grant for tax purposes?**

All receipts.

**23. Can I apply for other research grants while receiving the Sabbatical Research Grant?**

Yes, you are allowed to apply for other research grants while receiving the Sabbatical Research Grant. If you are awarded other grants, you must disclose them in your reporting to avoid potential overlaps in funding or conflicts of interest. This approach ensures transparency and compliance with all grant guidelines while maximizing resources to support your research objectives.

**24. What happens if I need to pause my sabbatical?**

Pausing the sabbatical is approved by the Head, Dean and Office of the Provost.

- If the payments are coming out monthly the grant would be paused and can be resumed if the sabbatical is resumed.
- If a lump sum payment of the grant occurred, salary deductions would continue until complete payment of the lump sum recovered.

**25. What happens if I don't spend all the allocated money for the research?**

The research grant would still be on the T4A on the research grant. If there are not enough expenses to equal the amount of the grant, then they would be taxed on the remaining amount.

If you have additional questions, please contact [avpa@uwindsor.ca](mailto:avpa@uwindsor.ca)