



Policy and procedures: Course release funded by research grant/agreement

1. Aim

To provide a framework to applicants in order to determine the category and rate of course release when submitting an application for research funding. The intent of this policy is to ensure that applicants are aware of the general conditions under which course releases are granted, as well as related approval procedures and budgetary implications of course releases prior to beginning an application for research funding.

2. Definition of course release

With the approval of the applicant's Chair and Dean, the applicant's teaching load is reduced by a pre-determined number of credits in a given academic year. The course from which the applicant is released is taught by a contract course lecturer. In most instances, the research fund pays the course lecturer's salary and benefits, either directly or indirectly.

Please note that course releases/buy-outs are only granted in exceptional circumstances. There should not be an expectation that, if a course release is eligible to be funded by the grant/agreement, it will be granted automatically.

Any course release requested as part of a research grant application needs prior approval from the Chair before further details can be discussed with OFFERING.

3. Scope

The current policy applies to:

- Faculty lecturers, tenure track and tenured academic staff in the Faculty of Education who hold or are applying for research grants/contracts that, among other things, fund course release;
- Funding opportunities and funds where, through one of the two categories below, course release is deemed an eligible or required expense;
- Applicable [fund types](#) are generally, but not limited to, Research Grants (2F), Other Research (2G), Non-research grants (2H) or Research contracts (2M). See the [Overview of fund types](#) for more detail.

N.B. Course release can be expressed as course buy-out, salary award, teaching release, etc.

4. Categories of course release

The category is determined entirely by the sponsor's guidelines and any conditions specific to the funding opportunity.



4.1. Category 1: Direct course buy-out (\$10,726/course, subject to change as per MCLIU Collective Agreement)

Definition: The salary expense (including benefits and mandatory government contributions) for the replacement of the course instructor is charged directly to the research fund. Course buy-out, teaching release or course release must be listed as an eligible expense within the funding opportunity guidelines.

Amount: The amount is determined by the [collective agreement between McGill University and McGill Course Lecturers and Instructors Union \(MCLIU\)](#). Since there is currently no collective agreement in effect, the Faculty uses \$8,726 per course plus 23% in benefits and mandatory government contributions, for a total of \$10,726. This amount is subject to change once a new collective agreement enters into force. Note that changes may be retroactive to 2018, the expiry date of the previous agreement.

Examples: Direct course buy-out is considered an eligible expense by very few funding opportunities. It can be included in ad hoc funding opportunities released by the Ministère de l'Éducation et de l'Enseignement supérieur (MEES), such as the "Chantier 7" program, and other ad hoc programs at the provincial and federal levels.

To complete the OSR checklist, please consult with OFFERING:

Planning and Resources	Are you and/or any faculty members requesting faculty salary support on this project? <input checked="" type="radio"/> No <input type="radio"/> Yes
	Are you requesting course release(s)? <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> If YES, please fill-in the blanks below.
	Specify the number of course releases requested over the grant duration: <input type="text"/> Would your course release(s) be paid from the grant? <input type="radio"/> No <input checked="" type="radio"/> Yes
	Is the project co-funded through other sources (cash and in-kind)? <input type="radio"/> No <input type="radio"/> Yes
	If Yes, check all that apply: <input type="radio"/> Department <input type="radio"/> Faculty <input type="radio"/> University <input type="radio"/> External Partners and complete Table of Commitments , append to Checklist, and submit to OSR. Contact OSR for assistance/questions.
	Are additional space or renovations needed to conduct this project? <input type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Other
Will this project potentially use the McGill farm facility? Please select the appropriate unit: <input type="radio"/> Agronomy <input type="radio"/> Horticulture <input type="radio"/> Dairy <input type="radio"/> Poultry <input type="radio"/> LARU <input type="radio"/> Arboretum <input type="radio"/> Other: _____	

4.2. Category 2: Course release as part of a salary award (\$23,836/course)

Definition: In the case of a salary award, a portion of the applicant's salary/effort is considered an eligible expense on the grant. A grant will only be considered as part of this category if funding agency guidelines **require** a certain percentage of time dedicated to research, and it exceeds the 40% which is already part of any researcher's usual workload. The fact that a percentage effort of the PI is required by a grant does not automatically translate into a course release.

Calculation procedure:

- On an annual basis, the Faculty receives a salary award reallocation from the Provost's Office, which is equivalent to 45% of the total salary award paid to McGill University. This allows the Faculty to cover the cost of the replacement instructor.

- The salary for a replacement instructor for a 3-credit course is currently estimated as follows:
 - \$8,721 gross salary + 23% in benefits and mandatory government contributions = \$10,726
- In order to cover the salary of the replacement instructor (as in Category 1), the salary award for course release must be sufficient so that 45% (the amount reallocated to the Faculty) of the total amount is equal to the needed \$10,726. Therefore, the total amount is \$23,836 (\$23,836 X 45% = \$10,726).


Note that the Faculty does not receive any funds over and above the amount required to cover the salary, benefits and mandatory government contributions for the replacement instructor.

Example: This mechanism is used for *FRQS Chercheurs-boursiers*,

To complete the OSR checklist, please consult with OFFERING:

Planning and Resources	Are you and/or any faculty members requesting faculty salary support on this project? If faculty salary support is checked, please complete the form below.	No <input type="radio"/>	Yes <input checked="" type="radio"/>	Note: This information will be provided to the Office of the Provost & Vice-Principal (Academic)-Academic Personnel Office.	
	Are you requesting course release(s)?	No <input type="radio"/>	Yes <input checked="" type="radio"/>	If YES, please fill-in the blanks below.	
	Specify the number of course releases requested over the grant duration:	_____		Would your course release(s) be paid from the grant? No <input type="radio"/> Yes <input checked="" type="radio"/>	
	Is the project co-funded through other sources (cash and in-kind)?	No <input type="radio"/>	Yes <input type="radio"/>		
	If Yes, check all that apply:	<input type="radio"/> Department	<input type="radio"/> Faculty	<input type="radio"/> University	<input type="radio"/> External Partners
	and complete Table of Commitments , append to Checklist, and submit to OSR. Contact OSR for assistance/questions.				
Are additional space or renovations needed to conduct this project?	No <input type="radio"/>	Yes <input type="radio"/>	<input type="radio"/> Other		
Will this project potentially use the McGill farm facility? Please select the appropriate unit:	<input type="radio"/> Agronomy <input type="radio"/> Horticulture <input type="radio"/> Dairy <input type="radio"/> Poultry <input type="radio"/> LARU <input type="radio"/> Arboretum <input type="radio"/> Other: _____				

If “Yes” is selected to the question regarding salary support, an additional page of the OSR checklist is generated at the end of the document (see below).



For internal use only: P.I. no. _____

Faculty Salary Request Form ** Please attach with your checklist **

Principal Investigator (PI): _____ Department: _____

Originating Sponsor Name (Agency, Corporation, Foundation, etc.) _____

Project title: _____

I have confirmed eligibility of faculty salary support from the sponsor / program with OSR.

Note:
 - Salary supplements are funds requested on top of a faculty member's regular salary;
 - Salary replacement is a portion of a faculty member's salary paid by the sponsor that then allows McGill to release a portion of institutional funds.
For physicians only: Clinical income replacement (to reimburse physicians for clinical activities).

1. _____	Department _____	Total % of effort/time on the project = Salary + Benefits _____	\$: _____	<input type="radio"/> Supplement <input checked="" type="radio"/> Replacement For physicians only: <input type="radio"/> Clinical income replacement
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Signature of Chair _____ Signature of Dean _____

Please PRINT Name: _____ Date _____ Please PRINT Name: _____ Date _____



Procedure

1. Complete the attached form and email a signed copy to your Chair.
2. If approved, OFFERING will determine the amount that the applicant must include in the budget of the specified program before returning a copy to the applicant.
3. The applicant must include a copy of the approved form with the OSR checklist and all supporting documents (e.g. Table of Commitments, copy of full application) when requesting ADR signature for the OSR checklist.
 - Please contact OFFERING for the internal deadlines if not found in OFFERING's weekly newsletter.
 - If a Table of Commitments is required, please submit a draft to OFFERING three weeks before OFFERING's OSR checklist deadline.

Please allow for 2 weeks for this procedure. It is essential that sufficient time be allowed in order to obtain the required approvals from the Chair and Dean's Office.

It is recommended that you initiate this conversation prior to drafting your budget as the option available to you may impact your application.

Contacts

Please direct any questions regarding this policy or procedure to your Chair.

Applicant: Role: Department: Number of credits requested per academic year over the course of the award period: Period of award (years):

Would your course release(s) be paid for by the grant? Yes No

Note: If your course release(s) will not be paid with grant funds, you must complete a Table of Commitments identifying this as Department co-funding and include the cash/in-kind value of the course release(s). Please email [OFFERING](#) for the Table of Commitments template.

Funding opportunity information

Sponsor: Program: Program website link:

Justification

To what extent is this course release/buy-out crucial given the current stage of your career as a tenure track and tenured academic staff?

Please comment on the exceptionally competitive nature of this funding opportunity, if applicable:

Other comments that you consider relevant for this decision:

Signatures

The applicant must sign the form and email it to their Department Chair. This process may take up to two weeks for review. It is recommended that you initiate this process prior to drafting a budget.

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/>	<div style="border: 1px solid black; height: 25px; width: 100%;"></div>
Signature of Principal Investigator	Date

Approval process

After reviewing, if the Chair feels the request is justified they will email the signed form to OFFERING. OFFERING will determine the correct category and obtain approval from the Dean's Office before returning it to the applicant. The applicant must include this form with the OSR checklist and all supporting documents by OFFERING's OSR checklist deadline. Please email OFFERING for the internal deadlines.

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/>	<div style="border: 1px solid black; height: 25px; width: 100%;"></div>
Signature of Department Chair <i>(ADR where required)</i>	Date approved

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/>	Category 1 <input type="checkbox"/>	
	Category 2 <input type="checkbox"/>	
Signature of Finance or Dean		<div style="border: 1px solid black; height: 25px; width: 100%;"></div> Amount per year