

IAPETUS2 Placements Scheme

Guidelines

Policy

AIMS & OBJECTIVES

1. The NERC IAPETUS2 Doctoral Training Partnership is committed to providing its award-holders with the widest range of opportunities to:
 - a) Apply their knowledge, skills and research in non-academic, real-world environments;
 - b) Gain new skills and competencies that complement but are not directly related to their postgraduate research and training; &
 - c) Generate societal and economic impact from their research by sharing the knowledge they have developed with non-academic actors and audiences.
2. To help achieve these objectives, IAPETUS2 runs its own placements scheme, complementing the range of NERC national Placements, for which our award-holders are also encouraged and supported to participate in. Our placement scheme has two different approaches:
 - a. a responsive mode that supports our award-holders to design their own placements, which they tailor to their specific research, training and career development needs. Suitable placements should be with a non-academic organization, using or developing skills related to the candidate's PhD research, however placements would not involve conducting research work that would be included in the PhD thesis; and
 - b. an end-user-driven mode that provides opportunities for end-user partners to develop and advertise specific projects available to IAPETUS2 students.

Students will normally be expected to take up at least **one** of these options during the period in receipt of stipend for their PhD study. A student will not normally be supported to take up more than two placements from either the NERC National placement or the IAPETUS2 placement schemes.

3. The following principles underpin our placement scheme:
 - a) **It can be student-led.** Our award-holders are empowered to develop their own placements, working in partnership with their supervisory team.
 - b) **It provides opportunities for end-users provide training opportunities directly tailored to their own and to the student's needs.**
 - c) **It is responsive and flexible.** Our award-holders can apply at any time during the academic year for funding and we seek to support innovative proposals in the most flexible way.
 - d) **It is comparable in levels of individual placement funding to the national Placement schemes.** Subject to available resources, the IAPETUS2 placement scheme will provide the same level of financial support to award-holders as the national UKRI Placements schemes.
 - e) **The time away on placement will be added to the end of the period of PhD study so will not reduce the time available for research and thesis preparation.**

FINANCIAL SUPPORT

4. The IAPETUS2 placement scheme will provide award-holders with the following financial support:
 - a) Additional funding whilst out on placement for the duration noted in ¶15, paid at the standard studentship stipend rate; &

- b) Additional funding of up to £1,000 per month to meet the costs of specific expenses arising from placements, such as additional travel and accommodation costs, following the guidelines outlined in Annexe I.
5. Award-holders can apply to undertake placements that are typically (a) between one and three months in duration for a responsive-mode placement; and (b) up to two months for an end-user defined placement.

TERMS & CONDITIONS

6. Whilst award-holders are on placements they will remain registered at their host institution and continue to interact and engage with their supervisory team, and the time that they are away on placement will extend their final thesis submission date.
7. Award-holders will not be employed or have any form of contract of employment with their host organization; however, award-holders may be required to sign a non-disclosure and/or confidentiality agreement to comply with their host organization's data-protection requirements and a Placement Agreement between the award-holder's host institution and their host organization will be entered into for all approved placements.

ELIGIBILITY

8. To be eligible to apply for and receiving funding for a placement via the IAPETUS2 scheme IAPETUS2 award-holders must:
 - a) Apply to begin the placement earlier than 3.5 years after the start date of their PhD (or as adjusted for students working part time, or who have taken a leave of absence);
 - b) Have completed successfully their year one progression review; &
 - c) Be assessed by their Department/School to be on-time to submit their thesis no later than four years after their PhD commenced (or as adjusted for students working part time, or who have taken a leave of absence).
9. Award-holders who have suspended their studies are **not** eligible to be considered for funding via the IAPETUS2 placement scheme while their funding is suspended.
10. Award-holders who hold CASE or Collaborative studentships, which already involve collaboration with a non-academic organization, remain eligible to apply for funding via this scheme. However, the placement should not be with the existing CASE or Collaborative partner.
11. Award-holders can only receive funding for two placements via this scheme during their period of study with IAPETUS2, although they can make multiple applications to the scheme. One of these placements **must** be of the end-user type.
12. Any non-academic organization, based in the UK or beyond, in either the public, private or third sectors, can host a placement funded via the IAPETUS2 placement scheme. Universities and other organizations designated as a Higher Education Institution are **not** eligible to act as a host organization. Award-holders are recommended to consider whether there is scope to carry out their placements with BAS, BGS or CEH.

ASSESSMENT CRITERIA

13. All applications for funding via the placement scheme will be considered and authorised by the IAPETUS2 Training Committee. The IAPETUS2 Academic Leads will jointly review and decide which applications to support and will assess applications against the following criteria:
 - a) **Contribution towards the award-holder's research and/or training** – How closely does the proposed placement support and complement the award-holder's doctoral research and/or training needs.
 - b) **Support and facilities provided by the host organization** – What support, facilities and resources will the award-holders benefit from whilst on placement, including matched-funding from the host organization.

- c) **Impact and knowledge exchange to be realised** – What impact is the placement anticipated to generate for the host organization and/or more widely, and how will the award-holder support and effect exchange of knowledge between themselves and the host organization.
- d) **Ethical and practical considerations** – Are there any ethical or practical issues affecting the proposed placement?

RESOURCING

14. Funding for the IAPETUS2 placement scheme is drawn from our overall budget and so is limited. Applications for funding from this limited budget will be reviewed and considered on a responsive, first-come-first served basis. Depending on the popularity of the scheme and the resources available to IAPETUS2, further funds may also be committed to this scheme.
15. The student applying for placement funds is encouraged to request that potential host organizations provide some matched funding to support placements, for example meeting half of the total cost of the placement, or providing funding to meet the costs of additional expenses, such as accommodation. By securing matching funds, the resources available to support this scheme will be used more effectively and allow more award-holders to benefit.

MONITORING & REPORTING

16. At the end of placements, supported award-holders are required to complete and submit a report, detailing the skills and experiences that they gained, together with details of the work they conducted and any resulting impact generated from the placement. Some or all of this report may be posted on the IAPETUS2 website to provide information for other IAPETUS2 students to assist the planning of their placements.

PLACEMENT TERMINATIONS

17. Should an award-holder be required to terminate their placement earlier than planned for any reason then they must notify the IAPETUS2 Administrator of their host institution immediately, detailing the reason for the termination. Following notification of termination IAPETUS2 will liaise with the award-holder to complete the termination and ensure the award-holder successfully returns to their doctoral studies. In such circumstances the IAPETUS2 will coordinate the return of any unused funds (both IAPETUS2 and matched-funding from the host) that may have been disbursed to the award-holder.

Process

DEVELOPING PLACEMENT PROPOSALS

18. Award-holders and their supervisory teams are encouraged to actively explore possible placements with potential host organizations. During these initial discussions IAPETUS2 will provide award-holders and their supervisory teams with advice where available. In addition to this approach, IAPETUS2 may also run calls inviting non-academic organizations to put forward placement proposals, which if approved by the IAPETUS2 Academic Leads will be advertised to our award-holders.

APPLYING FOR FUNDING

19. Once a placement proposal has been developed and there is an agreement in principle between the award-holder, their supervisory team and the host organization, the award-holder must complete and submit an IAPETUS2 Placement-Scheme Application Form, within which the details of their proposed placement and expected outcomes will be described. Letters of support for the placement from the host organization, the award-holder's principal supervisor and the Director of Postgraduate Studies of the award-holder's host Department/School must accompany the application. Applicants are strongly encouraged to consider any Health & Safety requirements at this stage (see ¶124) to avoid any difficulties later on in the process.

20. The IAPETUS2 placement scheme is responsive and, therefore, applications can be submitted at any point during the academic year.
21. Following receipt of an application, IAPETUS2 will check the award-holder's eligibility and then consider the application against the scheme's key criteria, outlined in ¶13. Applications will be reviewed by the IAPETUS2 Training Committee, who may seek advice and feedback on an application from other academic or administrative members of staff at Durham, Glasgow, Heriot-Watt, Newcastle, Saint Andrews or Stirling universities, or BAS, BGS or CEH.
22. It is anticipated that during term-time, applications will be processed within two to three weeks. Outside of term time, applications will be reviewed and decided within four to five weeks. Award-holders should bear these turnaround times in mind when applying for funding, although we will do our best to reply in a timely fashion should unforeseen opportunities present themselves.

ESTABLISHING APPROVED PLACEMENTS

23. An IAPETUS2 Administrator will notify the award-holder of the IAPETUS2 Training Committee's decision. This notification will detail the terms of the support and funding that IAPETUS2 has agreed to provide and this correspondence will be copied to the award-holder's principal supervisor, the Director of Postgraduate Studies and the postgraduate administrator of the award-holder's host department/school and to Durham University's Student Immigration & Finance Support Office (for Durham-based award-holders), Newcastle University's Faculty of Science, Agriculture and Engineering Research Student Support Team (for Newcastle-based award-holders), Manager of the College of Science and Engineering Graduate School, University of Glasgow, IAPETUS2 representative and Student Coordinator at BAS, BGS or CEH, Stirling University's Biological and Environmental Sciences Resource Coordinator, or the FAS for NERC Studentships, St Andrews.
24. Following notification of a successful application, the award-holder's host Department/School will follow their institutional Health & Safety requirements for student placements, gaining Health & Safety authorization for the placement to proceed. Following this, the Department /School will then raise and submit a concession to extend the period of receipt of stipend for PhD study of the award-holder for the period approved by IAPETUS2 to conduct the placement. This concession request must be copied to IAPETUS2, accompanied by the relevant Health & Safety authorization documentation. Should Health & Safety authorization not be obtained for the placement the application will be invalidated and cancelled.
25. On the raising of award-holder's concession to extend their period of receipt of stipend for PhD study, IAPETUS2 and the relevant internal department with responsibility for the payment of maintenance grants and tuition fees will arrange and confirm the disbursement of any additional expenses approved and for any further necessary changes to the award-holder's studentship. Supplementary expenses will usually only be reimbursed following submission of receipts, leases, tenancy agreements or invoices from the award-holder, unless agreed otherwise.
26. A Placement Agreement between the award-holder's host institution and host organization will be prepared and entered into prior to the commencement of an approved placement and following Health & Safety authorization. This legal agreement will detail the roles and responsibilities of each party to the placement, confirm any match-funding and how this will be accounted for and disbursed, and cover issues such as insurance coverage whilst the student is at the host organization and intellectual property (IP).

MONITORING & REPORTING

27. During placements award-holders will maintain contact with their supervisory team, who will continue to provide support and guidance.
28. Within one month of the completion of their placements award-holders must submit and complete a Placement Completion Report to the IAPETUS2 Administrator. The report will be reviewed by the IAPETUS2 Training Committee. The information provided by award-holders in their reports may be used by IAPETUS2 to publicize the placement scheme externally and the wider activities of IAPETUS2.

29. Award-holders will also be expected to give a presentation on their placement at the Annual Conference, the Induction event, or other IAPETUS events or seminars. They are also strongly encouraged, where possible, to give a presentation to their host at the end of the placement.

Further Information

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Authorization & Version Control

Version:	VI.2
Changes from last version:	Draft for approval by Academic Leads from IAPETUS2 Partner Organizations
Date Policy Last Approved:	
Next Date for Review:	

DRAFT

Annexe I – Guidelines on Placement Expenses

How do I go about claiming for my rent, do you pay it monthly or can I receive a lump sum?

The claim for your relocation rent will be paid to you in a lump sum. In order to claim, you will need to send a signed copy of your Placement Terms of agreement/contract with the host organization, a signed copy of your tenancy agreement and a completed claim form. This can be sent to us approximately two weeks prior to commencing the tenancy agreement.

How far in advance can I send in my accommodation claim?

You can send in your accommodation claim two weeks before your tenancy agreement starts, but this will need to be accompanied by a signed copy of your Placement Terms of agreement/contract with the host organization and claim form. If this is not sent to the IAPETUS2 administrator, no claims will be paid. You must also have received a confirmed start date for your Placement with the host organization

What documents do you require from me to receive a refund of expenses?

If you have to relocate to take up the Placement and wish to claim for relocation and rent, you will need to send a signed copy of your Placement contract/terms of agreement with the host organization, a signed copy of your tenancy agreement along with a signed claim form. To claim travel expenses, you will need to send a signed copy of your Placement contract/terms of agreement with the host organization, receipts for travel and a signed and completed claim form.

Do I have to be within a certain distance of my Placement to be able to secure a tenancy and claim relocation rental expenses?

Yes, you should be within 80 kilometres of your Placement host organization in order to claim for placement accommodation. In order to claim for relocation accommodation expenses you would be expected to be more than 80 kilometres from your university (home) accommodation.

What is the maximum amount I can claim for relocation accommodation costs?

When undertaking a placement, a student can claim up to a maximum of £3,000 based on a three-month placement award to cover **reasonable** travel and accommodation for the period of their placement. Students are expected to use the **most economical method** of travel and ensure that **rental amounts are not excessive** for one person.

Accommodation will only be covered if it is a **reasonable** amount. We would not expect your accommodation costs to be over £700 a month, and we will not subsidize expensive rent. If your rental agreement is above this threshold you will need to seek approval from the IAPETUS2 administrator before signing the agreement. If the IAPETUS administrator deems these costs as unreasonable we reserve the right not to pay out the full amount applied for, as we feel that £2,100 for accommodation over three months (or *pro rata* for longer placements) is more than enough to live comfortably.

In addition, the size of accommodation rented should be reasonable for one person. Ideally, students should be looking to rent one room in a shared house, a studio or a one bedroom flat.

Can I claim for relocation accommodation if the tenancy starts before my placement?

You can claim for up to one week before the start of your Placement, to allow for moving in.

Will you reimburse the deposit or admin fee charged by my landlord?

IAPETUS2 will reimburse administration fees, as long as they are detailed on the tenancy agreement, and as long as the total for the administration fees and rent does not exceed the allowance provided for the placement awarded.

IAPETUS2 will **not** reimburse your deposit. The responsibility for the deposit lies with the student.

Can I claim relocation rental expenses for living with relatives whilst at my placement?

No, you cannot claim rental expenses for living with relatives.

Can I claim relocation rental expenses if I am subletting and I do not have a tenancy agreement?

You can claim rental expenses if you are subletting. However, IAPETUS2 does discourage this, and advises you to seek a commercial rental agreement wherever possible. If you have to sublet, you will still need to provide signed confirmation (by you and the person you are subletting from) of the cost of the rent and the length of the sublet.

If you sublet, you will need to include the cost of utilities bills (gas, water, electric) in the sublet agreement if you wish them to be covered by IAPETUS2. IAPETUS2 will only pay utilities bills (gas, water, electric) if they are in the name of the student holding the Placement. The total cost of the sublet (including bills) must not exceed the allowance provided for the Placement awarded.

How do you establish whether relocation rental amounts are not reasonable?

We have established that up to £700 a month in rent is reasonable.

Will you reimburse my utilities bills if they are included in my rent?

Yes, IAPETUS2 will reimburse utilities bills where included in your rent, and we recommend that where possible you do get a tenancy agreement which includes bills.

Will you reimburse my utilities bills if they are not included in my rent?

We will reimburse utilities bills for gas, electricity and water only, again, as long as your accommodation costs do not exceed the allowance provided for the Placement awarded.

IAPETUS2 will only pay utilities bills (gas, water, electric) if they are in the name of the student holding the Placement.

IAPETUS2 will not reimburse you for phone, internet or TV license if these are separate from your rental agreement.

Can I claim for furniture hire if my accommodation is unfurnished?

No, IAPETUS2 advises students to get furnished accommodation, and will not pay for furniture hire.

Can I claim for local travel (e.g. underground travel) as well as accommodation expenses?

Students can claim up to a maximum of £3,000 based on a three-month placement award to cover **reasonable** travel to and from work and accommodation for the period of their Placement. This only includes public transport: buses, trains, the tube and trams. IAPETUS2 will not cover mileage, petrol costs, parking costs or taxi fares.

Students are expected to use the **most economical method** of travel and ensure that **rental amounts are not excessive** for one person.

Can I claim for travel home during the Placement period?

You can claim for one journey to the Placement region prior to the Placement commencing, and one journey back to your home at the end of the Placement. This must fall within the total allowance provided by the Placement awarded.

Can I claim for interview expenses?

You can claim for interview expenses from your host organization, if they are willing to pay them. IAPETUS2 will not reimburse interview expenses.

Will you reimburse my petrol expenses? Is there a mileage allowance?

No, IAPETUS2 will not normally reimburse petrol expenses or mileage costs. You should reach an agreement with the IAPETUS2 Administrator in advance if you think you will need petrol expenses. There is no mileage allowance.

Can I claim for car parking expenses?

No, you cannot claim for car parking expenses.

Can I claim for lunch expenses?

No, you cannot claim for lunch expenses.

Can I claim for taxi fares if public transport is not available?

No, you cannot claim for taxi fares.

Will you reimburse me for budget air fares?

IAPETUS2 will only reimburse airfare where it takes place as part of either the initial move to the region of the Placement, or the move home from the Placement. This will only be covered if you can provide evidence that the airfare (including all taxes and additional costs) will be less expensive than an off-peak, standard train ticket.

Will you reimburse my postage costs?

No, we will not reimburse postage costs.