Use of mini-grant funding awarded to Northeast I-Corps Hub teams for the reimbursement of customer discovery expenses is governed by this policy.

**Generally Acceptable Use**
Expenditures for local customer discovery activities are generally acceptable and do not require pre-approval. Expenses will **only** be reimbursed if all team members attend all sessions fully.

**Customer Discovery Research**
Expenditures that are directly relevant to the team’s conduct of customer discovery research are permitted. This may include the costs of travel needed to conduct face-to-face interviews, conference fees, and virtual tools to facilitate interviews such as Zoom subscriptions, LinkedIn Premium memberships, and inexpensive headsets.

**Acceptable Only with Prior Approval**
Other expenditures that directly further the aim of determining the commercial viability of the team’s business model may be permissible, such as:

- Membership dues for professional societies, trade groups, or associations
- Industry tradeshows, conferences (in-person/virtual), travel to potential interviews, or special interest group meetups
- Technical supplies related to developing a prototype (max of 10% of award amount)
  - 15-interview requirement must be completed before prototype development
  - Prototype development must be granted prior approval by the Cohort’s lead instructor and a request should be formally made through email using the NE Region I-Corps Hub Prototype Materials Request Form

All items listed above and anything that does not fall clearly into the categories described above require prior written approval from the Northeast I-Corps Hub Grants and Finance Administrator.

To be considered for approval of these expenses, especially where technical supplies and prototyping costs are involved, teams must be able to demonstrate sufficient and measurable customer validation. Additionally, teams must have a clearly defined testing plan, outlining the specific experiments to be undertaken in testing core assumptions and generating measurable outcomes.

**Unacceptable Expenditures**
Teams found to have used award funding to cover unacceptable expenditures will not be reimbursed and may be excluded from follow-on opportunities. Unallowable expenses include:

- Alcohol
- Gifts, gift certificates, meals, and beverages as incentives for interviewees
- Any expenses that would be classified as related to “marketing” or “sales”
- Survey tools such as Survey Monkey
- Email scrapers/extractors
- CRM software
- Conference booths
- Crypto currencies or other speculative assets
- Legal or accounting expenses
• Payment to “contractors” or other professional service providers (e.g., web developers, manufacturers, etc.)
• Gas for personal vehicle travel
• Pre-paying for events, travel, supplies, materials, and/or services outside of the program window
• Generally, anything not related to customer discovery or the use of lean startup-based methodology for assessing commercial viability

Access to Funds, Record Keeping, and Award Duration
Teams will be reimbursed up to $3,000 for allowable expenses incurred. The grant period starts on the first date of the cohort and concludes 90 days thereafter. Detailed receipts and documentation are required for all expenses in order to be reimbursed. Teams are permitted to submit one reimbursement request at the end of the grant period or sooner if all funds have been exhausted before the grant ends.

For travel to customer discovery interviews using a personal vehicle, please complete the Mileage Log template. Detailed addresses of starting and ending locations are required for mileage reimbursement. A google maps printout of the starting and ending locations, is required to verify mileage. Tolls and parking are reimbursable, but gas is not. Due to COVID, some institutions have created travel restrictions that must be observed. Please consult your institution’s Travel Policy before spending funds.

Air travel for customer discovery is considered a reimbursable expense, however, the following guidelines MUST be met and prior approval must be granted. Travelers should book economy seats ONLY. There are only 2 justifiable reasons for purchasing an upgraded flight ticket including a medical reason as to why you cannot book an economy seat accompanied by a doctor’s note or if the flight no longer has economy class seats available in which backup documentation is required for submission to support this (screenshots, printouts, etc.).

Hotel accommodations and meals while traveling on overnight trips associated with customer discovery can be reimbursed using the GSA per diem rates (https://www.gsa.gov/travel/plan-book/per-diem-rates) once pre-approved. The GSA per diem rates are to be used as a guideline on the daily reimbursement limit for teams in regards to meals, lodging, and travel. Receipts are still required for all expenses, especially meals, covered by that daily per diem rate. For travel of 30 days or less, Teams must claim actual meal and incidental expenses (M&IE); no per diem. Actual daily meal expenses claimed should be reasonable and appropriate and typically should not be more than $75 for domestic travel and $125 for international travel. Meals while not traveling overnight are not reimbursable. Travelers should stay in standard rooms ONLY. Suites and other upgraded rooms are not allowable expenses. Travelers may only accept complimentary upgrades.

Once the team is ready to submit a reimbursement request, the team must compile all receipts (and Mileage Log if any mileage reimbursement is requested) and the completed template into ONE document and send it directly to the Grants and Finance Administrator at finance-icorps@princeton.edu. Please allow at least two weeks for reimbursement processing.
FAQs

• If food is purchased, an itemized receipt is required (i.e., a receipt that shows all the items purchased, not just the bill total).
• If a receipt is received via email, save the email to PDF and include in the reimbursement request.
• LinkedIn, Zoom, or any such subscriptions during the grant period for access to potential customer information are allowable and reimbursable for a maximum of three months.
• Video conferencing fees during the grant period for conducting virtual customer interviews are allowable.
• Car rental is an allowable expense.
• The GSA mileage rate (found here) as of January 1, 2023 is $0.655 per mile.
• Mileage is only reimbursable with the use of an individual’s personal vehicle.
• Teams can be reimbursed for meals during a customer discovery interview. Documentation must be provided showing food/beverage was purchased for an interviewee.
• Funds cannot be used for purchases made outside of the specified program window.
• Gift cards and/or thank you gifts are not allowed.
• Printing of business cards, flyers, etc. is allowed, however prior written approval is required if costs are to exceed 10% of award.
• Team members will not be reimbursed for using their personal airline/hotel reward points to purchase any travel expenses.
• International travel under an NSF I-Corps grant is only reimbursable under special circumstances and all international travel must be pre-approved.
• International conferences are only approved when/if there is a strong reason why the team could not complete interviews domestically.

• How do I request approval for travel to an academic conference, event, or interview under the I-Corps grant?
  o You must request and receive approval in advance of expending funds for these types of activities.
  o Requests should be formally made using the Customer Discovery Expense Request Form
  o The form should be filled out with the following information and emailed to the grants and Finance Administrator, Jatanie Jonas:
    ▪ Team Name & Number
    ▪ Approximate Dates/Locations for proposed travel
    ▪ Event Name and link to site (if applicable)
    ▪ Who will be attending
    ▪ Is anyone on the team presenting a paper or other academic presentation
    ▪ Who will you be interviewing
    ▪ What hypotheses will you be testing
    ▪ How will you report on the trip outcomes in your annual/final reports
    ▪ What is the rough budget breakdown for the travel
  o Please Note: The I-Corps Instructors may have additional questions for the team in considering the request.

• If a team is simply traveling to conduct customer discovery interviews, and not attending an academic conference/event, for travel reimbursement the team simply need to provide the name, title, organization, and contact info for the person(s) they are interviewing.