

## MONTANA TECH UNDERGRADUATE RESEARCH PROGRAM

### APPENDIX B Budget and Expenses

Students, with their Mentor's agreement, may include in their proposal a budget request to cover expenses. The request must be **for no more than \$300 for URP or RAMP projects and up to \$500 for SURF projects**. The budget may include related travel, consumable supplies and expenses involved in scientific experiments. Matching funds from the department are encouraged. You must identify, quantify and justify each item for which you request money. The requested amount must be entered on the cover sheet. If no expense budget is requested, the proposal should state so in the appropriate section of the proposal.

#### Budget Preparation

The maximum amount available for budget requests is \$300 for URP or RAMP projects and up to \$500 for SURF projects. Mentors are encouraged to assist students in developing the budget request and details. Mentors are also encouraged to seek cost sharing using funds within their department. These cost-sharing agreements should be documented in the proposal.

**1. Supplies:** Consumables, such as laboratory and other reasonable supplies are allowed. Detail the quantity and cost of each item requested. Include a short description of why the item is necessary for the project in the Budget Justification. Computer and office supplies including, flash drives, paper, ink etc., are not allowable budget items and must be supplied by the student, mentor and/or department. Specialized computer software need for the project is allowed and must be described in the proposal.

**2. Travel:** Travel expenses may include the cost of transportation, lodging and meals to support the objectives of the proposal. Travel to conferences should not be included in the proposal budget. Information about presenting at off campus conferences, including suggestions for funding opportunities, is detailed in Appendix H on the Undergraduate Research website.

- a. Transportation:** If the research involves traveling off campus, you would need to reserve a campus motor-pool vehicle through Facilities at 406-496-4168. Facilities can assist with the completion of required paperwork prior to use of the vehicle and can provide mileage rates to use when preparing your budget. *Individuals who are not Montana Tech students or employees may not ride in State Vehicles.* If you choose to use a private vehicle, submit a Personal Vehicle Use Authorization form. <https://www.mtech.edu/research/student-research/guidelines.html>
- b. Meals:** Current 2019 in-state meal rates are Breakfast: \$5, Lunch: \$6 and Dinner: \$12, total: \$23 per day. Out of state amounts are, respectively, \$13, \$14, and \$23 for a total of \$50/day. You do not need receipts, but there are additional rules and restrictions regarding how many meals you can claim depending on the time of day you leave or return, whether your hotel serves complimentary breakfast, etc. Ask your Mentor to explain this to you or check out Montana Tech's travel policies online at <https://www.mtech.edu/administrative-services/acctspay/> or contact the Undergraduate Research Program for more information.
- c. Lodging:** Government rates should always be requested and will require ID upon check-in at the hotel. Typically, these rates are at or below the allowable in-state lodging rate reimbursement which is \$93 plus tax for most Montana cities. (<https://www.gsa.gov/travel/plan-book/per-diem-rates>) You must retain your receipt to submit after you return. If you do not have receipts or if you stay with a friend, camp, etc., the daily reimbursement rate is \$12 per night.

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It is the mentor's responsibility to ensure that all travel expenses comply with Montana Tech policies and that the amounts do not exceed the student's approved budget. If the budget is exceeded, the mentor's department will be responsible for the excess.

**Required Forms:** You are required to complete a 1). *Student Travel Itinerary and Emergency Contact List*, 2). *Travel Authorization* form **prior** to your trip. After completion of the trip, you must complete the 3). *Travel Expense Form* for reimbursement. If you are using a private vehicle, you are required to complete a 4). *Personal Vehicle Use Authorization* form. Mentors can assist with the completion of the required forms. See the Travel Instructions on the Undergraduate Research website before traveling.

<https://www.mtech.edu/research/student-research/guidelines.html>

**3. Budget Justification:** All budgets must include a budget justification section. This should be a short narrative explaining why each of the requested budget items, including travel, meals and lodging, are needed. You should use actual costs if possible. Note that the amounts shown below are an example only!

### EXAMPLE BUDGET

Item	Description	Quantity	Price	Total Cost
Travel Allocations - Vehicle & Mileage	Travel to Research Sites in Campus Vehicle	Estimate 1 Trip at 300 miles round trip	1 Trip @ 300 miles at current travel rate of 0.58 cents per mile	\$174.00
Travel Allocations - Hotel & Meals	Reservations at The Hotel Montana Breakfast, Lunch & Dinner - Day 1 Breakfast - Day 2	1 Night 3 Meals - Day 1 Breakfast - Day 2	Hotel - \$60 Meals - \$28	\$88.00
LM 335 Temperature Sensors	Sensors to measure temperature of slab and conduit	5	\$2.40	\$12.00
Shielded Instrument Cable	Cable for connecting sensors to data acquisition device	100 ft.	\$0.10/ft.	\$10.00
Circuit Board	A printed circuit board to efficiently house all circuitry	1	\$11.75	\$11.75
			<b>Total</b>	<b>***\$ 295.75</b>

\*\*Budget amount for URP or RAMP is \$300 and up to \$500 for a SURF project.

### EXAMPLE BUDGET JUSTIFICATION

To measure the temperature of the concrete slabs and conduit at each of the 5 dam sites near Great Falls, MT, it will be necessary to purchase 5 sensors at \$2.40 per, 20 ft. of cable per sensor for a total of 100 ft. at a cost of \$0.10/ft., and 1 detachable circuit board for \$11.75 from Walmart in Butte.

Travel to the various sites is needed and is estimated to be 300 miles round trip. Using the example's state travel rate of \$0.58/mile, this will cost \$174. It is estimated that it will take a total of 22 hours to do this including 2.5 hours to drive there, 2 hours to drive to each of the sites, 3 hours per site to attach the

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sensors and get them running properly, and 2.5 hours to drive back. Consequently, a night's stay is requested at the Montana Hotel for \$60 along with a breakfast as well as a full day of per diem charges for \$28. The total request for doing this project is \$295.75 as shown in the Budget Table. \*\*

<https://doa.mt.gov/employee-travel>

### **Purchasing Supplies**

#### **Purchases made with a Campus ProCard:**

1. Provide the Research Office the original receipt and invoice cover sheet. The Research Office will process the invoice with the appropriate ProCard manager. (Kramer Ungaretti at X4376 or Tim Tutty at X 4360). <https://www.mtech.edu/research/student-research/guidelines.html>

#### **Purchases made with a Purchase Order (PO):**

1. Contact the Research Office with the request by providing a written estimate of the purchase.
2. The Research Office will process the PO through accounts payable.

#### **Purchases made by a student that require reimbursement:**

1. Student provides the Research Office with the original receipt that has been signed and dated by the mentor, W-9 form, and Digger ID. W- 9 available at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
2. The Research Office will process the reimbursement through accounts payable and the reimbursement will be sent to the address on the W-9 form.

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### **Budget Spending Guidelines**

Supplies may be purchased with the help of your mentor. Mentors will be provided with the appropriate account code(s) to use. Original receipts must be turned in immediately to the Undergraduate Research Program in the Research Office (Museum 211) or to [urp@mtech.edu](mailto:urp@mtech.edu).

Purchases should be made using a purchase order or ProCard if possible. Before purchasing any software or licenses, you must check with the Research Office to be sure the software is not already available free.

### **Purchase Procedures**

#### **Purchases made with a Campus ProCard:**

2. Provide the Research Office the original receipt. The Research Office will process the invoice with the appropriate ProCard manager. (TBD X4376 or Kramer Ungaretti at X 4360).

#### **Purchases made with a Purchase Order (PO):**

3. Contact the Research Office with the request by providing a written estimate of the purchase.
4. The Research Office will process the PO through accounts payable.

#### **Purchases made by a student that require reimbursement:**

3. Student provides the Research Office with the original receipt that has been signed and dated by the mentor, W-9 form, and Digger ID. W-9 available at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
4. The Research Office will process the reimbursement through accounts payable and the reimbursement will be sent to the address on the W-9 form.

[http://www.mtech.edu/research/urp/URP-Supplies-and-Travel.pdf#Purchasing Supplies](http://www.mtech.edu/research/urp/URP-Supplies-and-Travel.pdf#Purchasing%20Supplies)

It is the Mentor's responsibility to ensure that all purchases comply with Montana Tech policies and that the purchases do not exceed the student's approved budget. If the budget is exceeded, the Mentor's department will be responsible for the excess.

#### **Research Office Contact Information:**

Museum 211  
406-496-4102  
[urp@mtech.edu](mailto:urp@mtech.edu)