Action Plan Guidelines

The following instructions cover typical McNair Scholars Program allowances. Please consult with the McNair Scholars Program Assistant Director about items that may be questionable.

- **Only valid, justifiable expenses will be considered.** See below for an explanation of standard categories of expenditures. If you have expenditures NOT covered by these categories, please identify and attach an additional sheet to the Action Plan.

- **Budgets must be reviewed and endorsed by the faculty mentor, McNair Director, and Assistant Director.**

- **Include a written justification for expenditures that are not obvious from a review of your Action Plan.** For example, if your project will result in your senior thesis and you are required to submit 10 bound copies. You should attach an explanation to the Action Plan if you list 10 reams of paper and an extraordinary amount of duplicating as part of your request.

- **The McNair Scholars program will not reimburse you for items retroactively purchased unless you have prior approval from the Assistant Director in writing.**

The following are the standard funding categories and allowable expenditures:

**Professional Organizations Memberships and Journals:** This category includes membership dues for honor societies, fees for academic/professional regional and national organizations, and journal subscriptions to journals not found at the UCSB library.

**Research Experience:** This category includes goods needed to conduct your research. This category cannot include items used for every-day/general purposes. There is limited funding for items such as office supplies and computer-related supplies. This category can also include laboratory supplies and expenditures such as the rental of equipment or furniture, payment to subjects (maximum of $10 per subject), and similar costs necessary for the completion of your project. If you are requesting payment to subjects, be sure you have adhered to university policies on the use of human subjects as explained in the McNair Scholars Program seminars. Subjects will need to sign a confirmation receipt. **Purchase of inventory equipment** (computers, software, printers, cameras, tape recorders, telescopes, etc.) is **not allowed.** General supplies cost limits are as follows:

- Binding: $30
- Computer related supplies (ink cartridge, memory keys, etc.): $70
- Office supplies (including paper, pens, and photocopies): $75

Adapted from the UC Santa Barbara, URCA Guidelines: http://www.ltsc.ucsb.edu/urca/research.php
**Domestic Travel:** Costs directly related to the collection of data or fieldwork taking place at a location further than “commuting distance” may be requested as part of your budget. However, evidence of the need for travel support must be itemized, clearly justified, and endorsed by your faculty mentor. Allocations in this category will be limited to round-trip transportation (economy rate) and lodging costs. Mileage reimbursement for driving to and from a research site in the local area will not be considered. The University has made a determination that travel packages purchased on the internet, for University-related business trips would not be allowed for reimbursement to the traveler unless there is sufficient itemized documentation. Please consult with the McNair Program Coordinator for the current reimbursement rates and other travel issues. The cost of spending two or three days at a research site (e.g., Bancroft Library in Berkeley) will be looked at more favorably than requests to make three trips to the same locale. The cost of meals while on research-related travel will be considered only for the McNair Scholar but cannot exceed a maximum of $40 per day. Only itemized food receipts will be reimbursed.

**Graduate School Campus Visits:** This category is used to identify the common colleges and universities UCSB McNair Scholars would like to visit within the academic year. All campus visits funded through the UCSB McNair Scholars Program must be group visits accompanied by a member of the McNair Scholars Program staff. Students who wish to attend campuses on their own are encouraged to use a portion of their McNair Scholars stipend or contact the school directly to inquire about the possibility of getting funds for an individual campus visit.

**McNair National Conferences:** There are numerous National McNair Conferences across the country. Every scholar is required to present at a McNair National Conference as part of the program. The McNair Scholars Program staff will suggest conferences that you can attend. For the 2008-2009 academic year we encourage juniors to attend the UC Berkeley conference taking place August 2009 and seniors to attend the University of Maryland at College Park conference taking place March 2009. Should you want to attend a different conference please consult the Assistant Director and Director.

**Academic and Professional Conferences:** The McNair Scholars Program award may be used to attend conferences only if you are presenting your own work, part of a panel/discussion, or part of a research team that is presenting. You must provide documentation to support your participation (e.g., invitation to present research). Scholars will need to fill out a conference request form indicating the nature of travel, conference details, and follow-up work anticipated. Scholars who would like to attend a conference but do not meet the above criteria will need to complete a conference request form with appropriate explanation attached. The Director or Assistant Director will notify you if your request has been approved.

Foreign travel cannot be funded.

ONLY ITEMIZED RECEIPTS THAT ARE PRE-APPROVED WILL BE REIMBURSED.
Examples of **Allowable** Action Plan Expenses (include but are not limited to):

- **Rental** of media equipment (non-McNair Scholars Program inventory)
- Poster printing
- Transcribing software
- Binding (up to $30)
- Computer related supplies (ink cartridge, discs, etc.) (up to $70)
- Office supplies (including paper, pens, and photocopies) (up to $75)

Examples of **Unallowable** Expenses (include but are not limited to):

- **Purchase of inventory equipment** (computers, software, printers, cameras, tape recorders, telescopes, etc.)
- Books
- Foreign travel
- Payment to entity for transcribing services
- Mileage reimbursement for driving to and from a research site in the local area
- Travel packages purchased on the internet, for University-related business trips
- Items that can be accessed through the Library or Interlibrary Loan program

**Scholar Stipend of $2800** (distributed in the summer)
The McNair Scholars Program provides a one-time stipend of $2800 to cover costs such as: tuition, fees, books, travel to conferences at which you will not be presenting, research supplies not purchased through the McNair Scholars Action Plan, individual travel to campus visits, GRE exam, application fees for graduate schools, general office supplies, and living expenses.

**ALL McNair Scholars financial awards are contingent on completion of required assignments, attendance and punctuality for McNair activities, progress on research and graduate school applications, and overall participation in the program.**