



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 that are NOT covered by these categories, please identify and attach an additional sheet to the Action Plan.
- **Action Plans must be reviewed and endorsed by the faculty mentor, McNair Director, and Assistant Director.**
- **Include a written justification for expenditures that are not listed on the Action Plan or that fall outside of the categories in this document.**
- **The McNair Scholars program will not reimburse you for items retroactively purchased unless you have prior and written Scholar Expense Request approval from the Assistant Director.**

The following are the possible 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 academic journal subscriptions.

Research Experience: This category includes materials and supplies needed to conduct your research. This category cannot include items used for every-day/general school purposes. This category can include laboratory supplies and expenditures such as the rental of equipment or furniture, payment to human subject participants (maximum of \$15 per subject), and similar costs necessary for the completion of your project. If you are requesting payment to human subject participants you must have obtained prior UCSB Internal Review Board (IRB) approval to work with human subjects, which is explained in the McNair Scholars Program seminars and binder. Human subject participants will need to sign a confirmation receipt. The UCSB McNair Scholars Program cannot provide support for human subject participant payments unless you have UCSB IRB approval prior to working with participants.

Purchase of inventory equipment is not allowed (i.e. computers, software, printers, cameras, tape recorders, telescopes, etc.).

Research Related 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.** A Travel Request Form must also be completed and approved by the McNair Director and Assistant Director prior to incurring any expenses. 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 will 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.** Please note: 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 and Interviews (Eligible once admitted into a graduate program or invited): This category is for university-sponsored campus visits. Many programs will invite juniors and seniors to visit their campus prior to applying or once students have been admitted. McNair will only support university-sponsored campus visits. Students who wish to visit campuses on their own are encouraged to use a portion of their UCSB McNair Scholars Program 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 McNair National Conferences across the country. The McNair Scholars Program staff will invite current students to attend a National McNair Conference when their research has sufficiently advanced in order to give an oral presentation.

Academic and Professional Conferences: Action Plan funds 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 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
- Lab equipment
- Compensation for human subjects

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
- Computer software that can be used at the UCSB computer labs on campus
- Binding
- Computer related supplies (ink cartridge, discs, etc.)
- Office supplies (including paper, pens, and photocopies)

Summer Research Scholar Stipend of \$3,000 (distributed in the summer)

The McNair Scholars Program provides a \$3,000 Summer Research Stipend for students who participate in the UCSB McNair Scholars Program Summer program. Students are welcome to use that stipend as they best see fit.

Please be aware that the UCSB McNair Scholars Program does not cover costs such as: tuition, fees, books, GRE exams, general office supplies, and living expenses. We encourage you to budget your \$3,000 stipend accordingly and consider all expenses you will incur throughout the year.

Very Important: Eligibility for the UCSB McNair Scholar's financial awards are contingent on the completion of required assignments, attendance and punctuality, progress on research and graduate school applications, and overall participation in the program. Scholars receive maximum support for maximum participation. Partial participation in the UCSB McNair Scholars Program will result in financial support ineligibility.