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 and should be limited to 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 that in the appropriate section of the proposal.

Budget Preparation
The maximum amount available for budget requests is $300. 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 supplies including, flash drives, paper, ink etc., are not allowable budget items and must be supplied by the student, mentor and/or department.

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 the Physical Plant (Vicki Buckley, 496-4168, vbuckley@mtech.edu.). Ms. Buckley can assist with 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.
   b. Meals: Current in-state meal rates are Breakfast: $5, Lunch: $6 and Dinner: $12, total: $23 per day. Out of state amounts are, respectively, $7, $11, and $23 for a total of $41/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 http://www.mtech.edu/administration/acctspay/docs/travelpolicy_2006.doc 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 $89 for most Montana cities. 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.

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 *Request and Justification for In-State Travel Authorization* form **prior** to your trip. After completion of the trip, you must complete the *Travel Expense Form* for reimbursement. Mentors can assist with the completion of the required forms. See the Travel Instructions on the Undergraduate Research website before traveling.

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 and are probably out-of-date.

**EXAMPLE BUDGET**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Allocations - Vehicle &amp; Mileage</td>
<td>Travel to Research Sites in Campus Vehicle</td>
<td>Estimate 1 Trip at 310 miles per trip</td>
<td>1 Trip @ 310 miles at current travel rate of 0.54 cents per mile</td>
<td>$178.25</td>
</tr>
<tr>
<td>Travel Allocations - Hotel &amp; Meals</td>
<td>Reservations at The Hotel Montana Breakfast, Lunch &amp; Dinner - Day 1 Breakfast - Day 2</td>
<td>1 Night 3 Meals - Day 1 Breakfast - Day 2</td>
<td>Hotel - $60 Meals - $28</td>
<td>$88.00</td>
</tr>
<tr>
<td>LM 335 Temperature Sensors</td>
<td>Sensors to measure temperature of slab and conduit</td>
<td>5</td>
<td>$2.40</td>
<td>$12.00</td>
</tr>
<tr>
<td>Shielded Instrument Cable</td>
<td>Cable for connecting sensors to data acquisition device</td>
<td>100 ft.</td>
<td>$0.10/ft.</td>
<td>$10.00</td>
</tr>
<tr>
<td>Circuit Board</td>
<td>A printed circuit board to efficiently house all circuitry</td>
<td>1</td>
<td>$11.75</td>
<td>$11.75</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>$300.00 Maximum</strong></td>
</tr>
</tbody>
</table>

**EXAMPLE BUDGET JUSTIFICATION**

In order 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 Radio Shack in Butte.

Travel to the various sites is needed and is estimated to be 310 miles round trip. Using the state travel rate of $0.54/mile, this will cost $178.25. 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 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 $300 as shown in the Budget Table.
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 to accounts payable with copies sent to the Undergraduate Research Program in the Research Office (Museum 211) or to 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:**
1. Original signed receipt with account code goes to appropriate Procard manager (Colleen Talbott x4376 or Colleen Fink x4340)
2. Send a copy of the receipt to the Research Office or urp@mtech.edu.

**Purchases made with a Purchase Order (PO):**
1. Contact Colleen Talbott or Colleen Fink with the account code to receive a Purchase Order.
2. Original signed receipts with account numbers are returned to the appropriate Colleen.
3. Send a copy of the receipt to the Research Office or urp@mtech.edu.

**Purchases made by student that require reimbursement:**
1. Student brings original receipts to mentor.
2. Mentor completes a memo to the Research Office requesting reimbursement for the student. Memo must include the student’s name, student ID, amount, campus account and original receipts. An example memo is available on the Undergraduate Research website as part of the purchasing instructions.

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

3. Reimbursement will be processed and a check mailed to the student's address indicated on the W-9.

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.