

URCA Grant Budget Review Worksheet

Overall Budget Structure & Categorization

- Official Budget Form:** Budget is on official form from URCA Website
- Expense Categorization:** Have you divided all your expenses into the two main categories?
- 1. Expected Expenses Incurred by Student:** For items you will purchase directly (e.g., books, standard supplies, limited software subscriptions, payment to subjects).
- 2. Expected Expenses Incurred by Department:** For specialty items only available via institutional purchase (e.g., controlled substances, specific lab tests).
- Justification:** Is every line item in your budget clearly justified in your proposal and essential for the successful completion of the research project?
- Poster:** Is the sole poster/conference expense for the URCA Week Poster Colloquium?

Detailed Budget Itemization

Goods (Consumable vs. Durable)

- Consumable Goods:** Have you correctly identified and itemized all consumable goods (items that are used up, like office supplies, single-use lab equipment, or robot components)?
- Durable Goods Prohibition:** Have you confirmed that your budget does **not** include the *purchase* of durable goods (e.g., computers, cameras, flash drives, voice recorders)?
- Durable Goods Exception:** If your project requires the purchase of a durable good that cannot be rented: Have you requested an exception from the URCA office *before* the application deadline and agreed?

Payment to Subjects

- Total Cap:** Is the total amount for subject payments at or below \$250 (including any associated fees)?
- Hourly Rate:** If payment is hourly, is rate at or below \$20 per hour?
- Lottery Cap:** If using a lottery system, is the total prize value at or below \$150?
- Required Details:** Does your budget justification clearly state the number of subjects and the payment method?
- Payment Method:** Have you confirmed that no payments direct payment methods?

- Disbursement:** Is the payment listed as student expense?

Books, News, and Data

- Library Check:** Have you verified that any requested books or articles are **not** available through the UCSB library or Interlibrary Loan?
- Itemization:** For each item, have you listed the Title, Author, and ISBN/DOI?
- Subscription Details:** For newspaper paywalls or data subscriptions, have you specified the cost and the exact dates of the subscription, adhering to the funding timeline?

Software

- Free Software Check:** Have you confirmed that the requested software is not available for free to students through UCSB (e.g., Microsoft Office, Canva, RCD campus tool explorer)?
- Timeline Alignment:** Does the requested subscription period for each software directly align with the timeline of the relevant task in your project?
- Cost-Effectiveness:** Have you chosen the most cost-effective subscription plan (e.g., monthly vs. annual; student vs. pro) that covers the project's needs within the funding period?

Travel

- Prohibited Travel:** Have you ensured the budget includes **no** funds for:
 - Conference travel?
 - International travel?
 - Travel within the Santa Barbara/Goleta commuter area?
 - Multiple trips to the same site?
- Mileage Reimbursement:** Is car travel calculated using the standard rate of \$0.70/mile?
- Per Diem:** Is the per diem request at or below the maximum of \$40 per day?

Creative Project Deliverables

- Physical Copies:** If your project is a creative work (e.g., book, prints), have you limited funding to a maximum of **two** copies?
- Performances:** If your project is a performance, have you limited funding to the expenses for only **one** performance?