NEW FACULTY Start-Up Funding

Office of Research Services UBC Okanagan

FOR ADMINISTRATIVE USE ONLY

FAS NUMBER	DATE RECEIVED

FACULTY MEMBER INFORMATION

SURNAME:	GIVEN NAME:
FACULTY:	ACADEMIC RANK:
DEPARTMENT/UNIT:	EMPLOYEE ID #:
DEPARTMENT ID #:	OFFICE PHONE NUMBER:
EMAIL ADDRESS:	☐ Dr. ☐ Mr. ☐ Mrs. ☐ Ms.

PROVOST FUNDING

Funding period (MM/DD/YYYY – MM/DD/YYYY) (please include start and end date):

SOURCE ACCOUNT #	AMOUNT	EXPLANATORY NOTES
ORS to enter		

FACULTY FUNDING (if applicable)

Funding period (MM/DD/YYYY – MM/DD/YYYY) (please include start and end date):

SOURCE ACCOUNT #	AMOUNT	EXPLANATORY NOTES

TOTAL FUNDING (Provost + Faculty)	

Form prepared by: *(e.g. faculty administrator or designate)*	

SIGNATURES

Dean (or designate):	Signature:	Date:
Provost Office:	Signature:	Date:

Please complete, sign, and return this form to:

**Candace Martyn, Awards Officer Office
of Research Services (ORS) FIP 336
Kelowna, BC
V1V 1V7
250-807-9658**

Instructions for completing the form:

All fields require completion; all information is required for account setup.

1. Faculty Member Information: complete for all ten items
2. Provost funding: provide funding period, amount, and any explanatory notes or details
3. Faculty funding: if applicable, provide funding period, source account, amount, and any explanatory notes
4. Total Funding: enter total amount of funding to be provided (Provost + faculty)
5. Form Prepared By: provide name of individual who completed the form in case follow up is required
6. Signatures: obtain Dean's signature (or designate)
7. Return original form to Office of Research Services (ORS)
8. Please note that delays in receipt of this form, or incomplete forms, may delay account set up.

Signatures: The **original** (no photocopies or facsimiles) signatures of the Dean or Dean Designate must accompany all applications.

Grant Administration:
- Individual P/Gs (research accounts) will be established for each new faculty member's start-up funding once all required information is obtained.
- P/G information will be sent automatically to the faculty member via RISe once account is created.

Start-Up Fund Guidelines for Professors

You can access your funds once you have received your Research Project Budget (RPB) via email. You are responsible for managing your Start up Fund account; this includes keeping track of spending, collecting receipts, etc.

You will either submit original receipts, along with a completed requisition form, to your department/unit secretary or you can apply online for a Purchase Card (P-Card). If you plan to apply for a P-Card, please contact your department/unit secretary. As the card coordinator, he/she will review receipts and ensure adherence to spending guidelines.

For purchases over $3,500 you must go through UBC Supply Management. Information about paying for goods and services is available on the Supply Management website:
http://www.supplymanagement.ubc.ca/

You are the first signing authority for your account, however, if you are reimbursing yourself for research purchases made with personal funds please note that University policy stipulates that an individual at least one level above you must sign the claim form. This would be your Department Head or Dean, depending on your position.

Start-up funds should be used to 'start-up" your research at UBC Okanagan and extensions are only permitted under extenuating circumstances.

The following are eligible expenses for the use of start-up funds:

- computer equipment (for use at UBC Okanagan) over and above the standard equipment provided for you
- printer and scanner
- computer programs
- lab (and/or other) equipment and supplies
- rental of research equipment
- supplemental office supplies
- graduate or undergraduate student research assistant
- research technician or staff
- research related travel
- research related long-distance phone charges
- books and periodicals directly related to research

The following items cannot be purchased with start-up funds.

- computer and office equipment for home use
- cost of home internet
- setting up home office

Items not covered by either list may be permitted with the written permission of the Dean.

Start-Up Fund Guidelines for Tenure-Track Instructors

You can access your funds once you have received your Research Project Budget (RPB) via email. You are responsible for managing your Start up Fund account; this includes keeping track of spending, collecting receipts, etc.

You will either submit original receipts, along with a completed requisition form, to your department/unit secretary or you can apply online for a Purchase Card (P-Card). If you plan to apply for a P-Card, please contact your department/unit secretary. As the card coordinator, he/she will review receipts and ensure adherence to spending guidelines.

For purchases over $3,500 you must go through UBC Supply Management. Information about paying for goods and services is available on the Supply Management website:
http://www.supplymanagement.ubc.ca/

You are the first signing authority for your account, however, if you are reimbursing yourself for research purchases made with personal funds please note that University policy stipulates that an individual at least one level above you must sign the claim form. This would be your Department Head or Dean, depending on your position.

Extensions to start-up funds are only permitted under extenuating circumstances.

The following are eligible expenses for the use of start-up funds:

- computer equipment (for use at UBC Okanagan) over and above the standard equipment provided for you
- printer and scanner
- computer programs
- supplemental office supplies
- conference related travel
- expenses related to the scholarship of teaching and learning
- books and periodicals directly related to the scholarship of teaching and learning

The following items cannot be purchased with start-up funds.

- computer and office equipment for home use
- cost of home internet
- setting up home office
- hiring of graduate or undergraduate student assistant

Items not covered by either list may be permitted with the written permission of the Dean.