



Research Start-up Fund Guidelines

You can access your funds once you receive your Research Project Budget (RPB) via e-mail. You are responsible for managing your start-up fund account. This includes keeping track of spending, collecting receipts, etc.

You may wish to apply online for a Visa card at <https://finance.ubc.ca/forms> for purchases from your account. This website may prompt you to login using your CWL ID and password. You may also purchase goods directly and seek reimbursement.

After you have made your purchases, you will submit original receipts with a completed requisition form to the FASS Finance Assistant, Barbara Stein-Zarchikoff (barbara.steinzarchikoff@ubc.ca). The Financial Assistant is responsible for assisting FASS researchers with financial transactions.

For purchases over \$3,500, a purchase order is required. Information about purchase orders can be found at <https://finance.ubc.ca/procure-pay/private/buy/private/purchases-above-3500/private/purchase-order-requirements>

If you require assistance preparing a purchase order, the Financial Assistant can help you.

You are the first signing authority on your start-up account; however, if you require reimbursement 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 will be your Department Head or Dean, depending on your position.

Extensions to start-up funds are only permitted under extenuating circumstances. Should you require an extension, please contact the Associate Dean, Research.

The following are eligible expenses for the use of start-up funds: ¹

- Research equipment and supplies
- Lab operating costs
- Travel to establish collaborations, fieldwork, data collection
- Trainee visits (annual maximum of \$5,000)
- Computer (hardware and software) required for research beyond university provisions (with adequate justification)

¹UBC Okanagan Strategic Research Support Plan 2017-2022, Barker, Phil, VPR and AVPR



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- HQP stipends (student, RA)
- Books and periodicals related to research (beyond those available through the UBC Library system)
- Research technicians, other staff

The following items *cannot* be purchased with start-up funds:

- Relocation expenses
- Furniture
- Renovations
- Electronics and appliances for non-research purposes
- Home office equipment, supplies, communications costs (e.g., internet)

Contacts:

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Portfolio: Financial transactions related to research accounts, such as reconciling Visas, expense claims, purchase orders.