

2017 Summer Undergraduate Internship Program

Purchasing Policy and Budget Guidelines

POLICY COMPARISON QUICK CHART

	Reimbursement Policy (Option 1)	Traditional Policy (Option 2)
Purchases are made by NGRREC/ L&C staff.	NO	YES
Purchases are made by the advisors.	YES	NO
Advisors can get reimbursed for supply purchases & contractual services.	YES (by invoice only)	NO
Advisors can get reimbursed for project related travel costs.	YES	YES
Advisors can make purchases during the month of June.	YES	NO (initial purchases must be submitted to NGRREC by May 23 due to L&C fiscal closeout period)
Advisors can make purchases during the month of July.	YES	YES
Advisors can use their institutional discounts when making supply purchases from vendors.	YES	Only with an official quote provided by the vendor and submitted along with advisor's purchase order request to NGRREC.
Advisors can purchase inventoried equipment such as tablets or computers.	NO (not without prior NGRREC approval)	NO (not without prior NGRREC approval)
Advisor deadlines for submitting purchase supplies list and order request (a specific form will be provided).	N/A	Prior to May 23; July 1-July 24
Advisor deadlines for submitting invoices for reimbursement of supply purchases and contractual services.	June 30 and August 31 (submit <i>only two invoices, one for each fiscal year</i>)	N/A
Advisor must estimate shipping costs prior to making purchases/ submitting purchase requests.	NO	YES
Advisors can make purchases that are different from what is listed in proposed project budget.	Only with prior approval	Only with prior approval
Advisors can make changes to proposed budget amount.	NO	NO
Advisors can shift approved budget amount between budget categories (e.g. travel vs. supplies).	YES (with NGRREC approval via email)	YES (with NGRREC approval via email)



REIMBURSEMENT PURCHASING POLICY (OPTION 1): We encourage any advisors who have the ability to get reimbursed for their purchases to choose this option. We believe this new option to be much more efficient than Option 2. Advisors will choose *only one* of the two purchasing options. They cannot do both.

The reimbursement purchasing policy plan (Option 1) is more flexible for those who are able to order their own supplies and accept a reimbursement from NGRREC for their supplies after the fact. Option 1 will allow advisors to order and use their institutional discount with their vendors and place orders as they typically would for their research. To get reimbursed for these purchases under Option 1, original receipts for these supplies and contractual services are to be turned in along with an invoice off which L&C Accounting will reimburse approved purchases. Invoices will be submitted only twice during the internship period, representing both fiscal years the program spans. Purchases made in FY17 and prior to June 30th, will be submitted by June 30th. Purchases made in FY18 and between July 1 and August 1st will be submitted by August 31. Each advisor choosing Option 1 will submit *at most* two invoices for supplies reimbursement. It is up to the advisor to keep track of their approved budget amount to ensure that they do not exceed their total approved budget. NGRREC/ L&C will reimburse only up to the amount and for those items approved in your project proposal. Additionally, NGRREC reserves the right not to reimburse for purchases not listed on your approved budget and where prior approval via email was not provided. No inventoried equipment can be purchased (e.g. tablets, laptops, etc.), without approval at the time of proposal acceptance. We discourage including these items as part of your budget as they become the property of L&C after the term of the internship. ***Please note that L&C is tax exempt and therefore does not reimburse for tax costs.***

The travel reimbursement policy is separate and the same for everyone. Please see the section below that outlines the travel reimbursement policy.

TRADITIONAL PURCHASING POLICY (OPTION 2): This option is required for employees of L&C and NGRREC and is an option for those advisors who do not have the means to purchase their supplies in advance and get reimbursed later.

Under this policy, advisors are encouraged to submit their purchasing forms for materials and supplies identified in the budget early (March-April) as all purchases **must be made through Lewis and Clark Community College through a requisition process**. This process will be outlined upon proposal acceptance. In compliance with L&C's purchasing policies, all expenses must be incurred between March 1 and August 1, 2017. Purchase of non-intern related and inventoried equipment, such as tablets, computers, and printers is discouraged and must be approved *prior to* acceptance of the intern project. If you plan to purchase inventoried equipment, please list these items in your proposal. Please see 'General Purchasing Guidelines' section for further details.

BUDGET AND PURCHASING GUIDELINES

Proposal Budget

There is up to \$1,500 available for your project budget. Budgets over \$1,500 will not be



approved. Your budget is allocated into three general categories: 1) equipment and supplies, 2) contractual services, and 3) travel and lodging reimbursements. Within travel and lodging reimbursements, costs are divided between project related travel (i.e. extended stays at distant field sites) and Symposium related travel. Symposium travel can include transportation and hotel costs for you and/ or a co-advisor to attend the Symposium. Student hotel costs for Sunday and Monday nights are covered by the program. When estimating your supplies budget, please take into account estimated shipping and freight costs. Students will be provided \$4,000 gross pay for their internship and *up to* an additional \$1000 in reimbursement funds, which they can use towards summer housing, transportation to/from the short course week, Symposium, and their internship host location. These student incurred costs should not be included in your advisor budget. Neither advisor nor student funds can be used for daily transportation to work.

General Purchasing Guidelines

In accordance with the purchasing policies of L&C (the fiscal agent for this program), all purchases should be outlined within the budget of your proposal. For those following the Traditional Policy, items **must be purchased through Lewis and Clark and PRIOR TO May 31, with Purchase Requests to NGRREC by May 23.** L&C has a fiscal close-out period the entire month of June, during which purchases cannot be made. Additional supply purchases may be made after July 1. If there are any questions about an item you wish to order for your project, please contact the program coordinator at ngrrecintern@lc.edu.

Do not include the \$4,000 intern stipend or \$1000 intern reimbursement in your budget total.

Supplies and Equipment

Please note that supplies purchased by you or your organization cannot be reimbursed if you are following the Traditional Policy. No exceptions. You are only allowed to choose one policy and follow that for the duration of the internship cycle. Information regarding the name, address, website, and telephone number of the vendor, along with a description of the item, catalog/item number, quantity, cost per unit, estimated shipping costs, and the shipping address will be submitted to NGRREC staff through a requisition form provided to you in advance of the purchasing period. Once received, purchase orders will be processed through the L&C accounting office. Please remember to account for shipping and freight fees in your budget as these can add up, especially when ordering from multiple vendors. Additionally, please be aware that there may be a couple of days before the purchase requisition is approved and the details sent to the vendor for purchase, so plan accordingly and avoid last minute purchases. Note that purchases are made through L&C, which may not have the same institutional discount as your organization. Should you wish to purchase incentives for focus groups, interviews, or environmental education participation enticements, these would be listed under supplies and equipment. Keep in mind that *gift cards are not allowable purchases for incentives or other purposes, as they incur a tax to the recipient*; this applies to both purchasing policies. Requests to purchase inventoried items such as tablets, computers, and printers are generally not authorized purchases for the intern program. Should you wish to order one of these items, the item must be listed in your project proposal and you will be notified regarding the approval of this purchase. If there is any question about an item you wish to order for your project, please contact the program coordinator at ngrrecintern@lc.edu.



Contractual Services

These would be services that you must hire an outside lab or organization to complete analyses, rental equipment, etc. for the purpose of your project. These would likely need an invoice for services for which L&C can then process a payment requisition (Traditional Policy). It is important that any potential contractual services be noted in your budget proposal.

Travel Reimbursements

You can choose to request a portion of your budget to go towards project related travel and lodging while away at field locations, as well as funding for you to attend the required Intern Symposium. **While no purchases will be allowed for the Traditional Policy during the fiscal close-out period (June), travel reimbursements will continue to be processed throughout the duration of the internship.** If you have budgeted for travel reimbursement within your proposal, you may submit requests for travel reimbursement either as it occurs, or once a month, whichever you prefer. A travel reimbursement form and instructions will be provided to you. Please note that students are not allowed to request reimbursement for travel back and forth from the work place and home, but if they are using a personal vehicle for *project related* work, they may request reimbursement from the project/ advisor budget funds, if you have allocated your budget funds for such.

Mileage is reimbursed at \$0.40/ mile (L&C rate) if a personal or institutional vehicle is used. Alternatively, if a rental car is used, we can reimburse the rental fee and gas. You and your intern may receive up to \$40/day against receipts for meal per diem while conducting overnight fieldwork or project related travel. If budgeting for hotel lodging expenses while conducting field work, you may also request reimbursement for that expense at a rate no greater than the State rate.

FAQs

1. I am on the Traditional Plan, can I be reimbursed for purchases made during the month of June? *No. L&C cannot reimburse any supply purchases made at any time for those following the traditional plan, including the fiscal closeout period of June. All supply and equipment purchases must be made through L&C accounting office prior to June 1 or after June 30. If you would like to be reimbursed for purchases, you must follow the Reimbursement Plan.*
2. Can I purchase incentives as giveaways for focus groups and other education or human dimension project? *Small items may be purchased as incentives or giveaway items. Gift cards are not allowable purchases, as these are taxable items.*
3. Does L&C have accounts with science supply vendors in which they receive institutional discounts? *Yes, if you would like to inquire about a specific vendor, please contact NGRREC Assistant Denise Gray at degray@lc.edu. A safe way to get price quotes is to use the general online website price, which is not tied to any specific account or school.*
4. What is the mileage rate for using an institutional or personal vehicle for project related travel reimbursement? *L&C will reimburse you at \$0.40/ mile for use of a personal or institutional vehicle for project related travel.*
5. Are rental car costs an allowable travel expense? *Yes, this would be an allowable travel*



expense as long as it is included in your proposed budget. In this case, you would submit receipts for the rental car and gas costs along with a travel reimbursement form and L&C will issue you a reimbursement check to cover these costs.

6. Can I get reimbursed for hotel and transportation costs for attending the Intern Symposium? *Yes, these are both allowable travel reimbursement costs as long as they are included in your proposed budget.*