

Topic / Item:	Policy / Comment:	Source Reference:
<p><b>Nomination</b></p>	<p>Presidential Chair Award 2024-2025 nominations: <b>Due: January 24, 2024</b></p> <ul style="list-style-type: none"> <li>▪ For information about the nomination packet requirements and submission, visit <a href="#">Presidential Chair website</a>.</li> <li>▪ Competitive proposals address the evaluation criteria (as described in the <a href="#">Evaluation Guidelines</a>)</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> <li>▪ Nomination Form: (<a href="#">PDF</a>) or (<a href="#">MS Word</a>)</li> <li>▪ <a href="#">Evaluation Guidelines (pdf)</a></li> </ul>
<p><b>Appointment Duration</b></p>	<ul style="list-style-type: none"> <li>▪ The Presidential Chair should be employed for: <ul style="list-style-type: none"> <li>– A maximum of 12 months.</li> <li>– A minimum of 1 quarter (10 weeks) for an equivalent of full-time service. This service (i.e., 400 hours) could be accumulated over multiple visits.</li> </ul> </li> <li>▪ Each appointment or reappointment with a Visiting title shall be for a specified term not to exceed one year.</li> <li>▪ Nominations of less than full-time and/or for less than three months should include substantial justification within the proposal for the need for this part-time and/or short-term appointment.</li> </ul>	<ul style="list-style-type: none"> <li>▪ UCSF VPAA</li> <li>▪ <a href="#">APM-230</a> Sect.17 &amp; 20h(1)</li> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> </ul>
<p><b>Appointment Title</b></p>	<ul style="list-style-type: none"> <li>▪ Presidential Chairs must hold the title of Visiting Professor.</li> <li>▪ The individual will be appointed as a Visiting Professor (Title Code 1118). The appointment will be governed by <a href="#">APM 230</a>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">APM 230-4</a> (b)</li> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> </ul>
<p><b>Appointment Eligibility</b></p>	<ul style="list-style-type: none"> <li>▪ Presidential Chair candidates must be in the Professor series.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">APM-230</a></li> </ul>
<p><b>Appointment Purpose and Activities</b></p>	<ul style="list-style-type: none"> <li>▪ Presidential Chairs are intended to encourage new or interdisciplinary program development or to enhance quality in existing academic programs of the University.</li> <li>▪ It is intended that incumbents be highly visible on campus, and that their tenure be accompanied by appropriate campus-wide activities and publicity.</li> <li>▪ In addition to participating in research, instruction, or other creative activities, each incumbent is expected to present a major public lecture or series of lectures.</li> <li>▪ Presidential Chairs should be viewed as campus wide resources.</li> <li>▪ Presidential Chairs, as full-time Visiting Professors, may be assigned clinical duties with the approval of the Chancellor.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">APM-265</a> -Sect.1,6</li> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> <li>▪ <a href="#">APM 230-18</a> (c)</li> </ul>
<p><b>Appointment Tenure</b></p>	<ul style="list-style-type: none"> <li>▪ Neither tenure nor security of employment is acquired by appointment to a Visiting title.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">APM 230-20</a> (g)</li> </ul>

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<b>Funding</b>	<ul style="list-style-type: none"> <li>▪ Upon request, funds can be made available to the recipient starting July 1 of the fiscal year of the Presidential Chair appointment.</li> <li>▪ The host department is responsible for initiating the process to transfer funds (details in the award notification letter).</li> <li>▪ Funds for Presidential Chairs may be used to support instructional activities, research, or other creative activities of the incumbent chair holder.</li> <li>▪ Unexpended earnings will be added back to the Presidential Chair fund account for subsequent award years.</li> <li>▪ Funds should not be expended for anything not related to a chair holder’s activity. More information provided in this document and in the <a href="#">budget justification guidelines</a>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> <li>▪ <a href="#">Budget Justification Guidelines (docx)</a></li> </ul>
<b>Budget</b>	<ul style="list-style-type: none"> <li>▪ Use of the UCSF Presidential Chair Award <a href="#">budget template</a> and <a href="#">budget justification guidelines</a> are recommended.</li> <li>▪ For information and resources on budget development and justification, visit the <a href="#">UCSF Office of Sponsored Research - Develop a Budget</a>.</li> <li>▪ Please work with the UCSF host school dean’s office (administrative/finance director) and the department’s HR Academic Generalist (<a href="#">Find Your HR Rep</a>) to ensure compliance with the appropriate policies with respect to the proposed budget.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Find Your HR Rep</a></li> <li>▪ <a href="#">UCSF OSR - Develop a Budget</a></li> <li>▪ <a href="#">UCSF Accounts Payable</a></li> <li>▪ <a href="#">UCSF Presidential Chair Award</a></li> <li>▪ <a href="#">Budget Template (xlsx)</a></li> <li>▪ <a href="#">Budget Justification Guidelines (docx)</a></li> </ul>
<b>Budget Modifications</b>	<ul style="list-style-type: none"> <li>▪ Modifications may be made to an existing award if changes do not affect the approved salary total, the approved budget total, or the approved categories in the budget.</li> <li>▪ Requests for no cost extensions (no more than 6 months at a time) and for re-budgeting may be initiated by the award recipient, the department, or the sponsor.</li> <li>▪ Email requests should include:               <ul style="list-style-type: none"> <li>– Type of modification proposed</li> <li>– Reason for request</li> <li>– Current balance of funds</li> </ul> </li> <li>▪ Must be approved by the Vice Provost Academic Affairs.</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">UCSF OSR - Modifications of Award</a></li> <li>▪ UCSF VPAA</li> </ul>
<b>Evaluation Criteria</b>	<p>The Committee uses the following criteria to <b>evaluate the nomination packets</b>:</p> <ul style="list-style-type: none"> <li>▪ <b>Plan, Nominee, Innovation, Budget, Overall Impact</b></li> <li>▪ Competitive proposals address these criteria (described in the <a href="#">Evaluation Guidelines</a>)               <ul style="list-style-type: none"> <li>– Nominators have used the evaluation criteria to outline and structure their proposals.</li> </ul> </li> </ul>	<p>Key Resource:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Evaluation Guidelines (pdf)</a></li> </ul>

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<b>Honorariums</b>	<ul style="list-style-type: none"> <li>▪ <b>Payment in the form of an honoraria is not appropriate for a Visiting Professor.</b></li> <li>▪ In general, University faculty and full-time academic appointees are not eligible to receive additional compensation for activities related to their recognized University duties.</li> <li>▪ Payments for independent consultants, faculty consultants, performance fees, and professional services are non-honorarium transactions.</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">APM- 666-4</a></li> <li>▪ <a href="#">UCSF Policy 300-29</a></li> </ul>
<p><b>Maximum Meal Expenses</b></p> <p><b>Meetings and Entertainment</b></p>	<ul style="list-style-type: none"> <li>▪ The University permits expenditures for meals and light refreshments for the purpose of conducting substantial and bona fide University business.</li> <li>▪ <b>Maximum meal expenses per person</b> <ul style="list-style-type: none"> <li>- Breakfast \$31</li> <li>- Lunch \$54</li> <li>- Dinner \$94</li> <li>- Light Refreshment \$22</li> </ul> </li> <li>▪ <b>Frequency</b> <ul style="list-style-type: none"> <li>- Meals are limited to no more than once a month or twelve times per year, per group. Light refreshments are limited to no more than twice per month, per group.</li> </ul> </li> <li>▪ <b>Alcohol</b> <ul style="list-style-type: none"> <li>- To date, the Vice Provost has not approved of the purchase of alcohol with Presidential Chair funds.</li> </ul> </li> <li>▪ For guidance on allowable and unallowable expenses, please review the <a href="#">UCSF Meeting &amp; Entertainment Expenses</a> information and UC Policy <a href="#">BUS-79</a>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Meeting and Entertainment Expenses</a></li> <li>▪ <a href="#">BUS-79</a> (revised 7/1/22)</li> <li>▪ UCSF Policy <a href="#">200-31</a></li> </ul>
<b>Salary</b>	<ul style="list-style-type: none"> <li>▪ The salary of an appointee with a Visiting title shall be determined according to the special circumstances of the case. In some cases, it will be appropriate to separate considerations of rank from those of salary.</li> <li>▪ <b>Salary rate should be justified and reasonable based on objective factors</b> (such as compensation levels for comparable positions, the duration, and percent time of the nominee's appointment).</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">APM-230</a></li> <li>▪ UCSF VPAA</li> </ul>
<b>Supplies</b>	<p>Reimburse for actual and necessary expenses as allowed by department and UC policy. Office of Sponsored Research website provides helpful reference for drafting a <a href="#">budget for materials and supplies</a>.</p> <ul style="list-style-type: none"> <li>▪ The <i>budget</i> should briefly describe the supplies and overall cost.</li> <li>▪ The <i>budget justification</i> should provide a detailed breakdown of the purpose, necessity, and cost of the supplies.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">UCSF OSR - Develop a Budget -Materials and Supplies</a></li> <li>▪ <a href="#">Budget Template (xlsx)</a></li> <li>▪ <a href="#">Budget Justification Guidelines (docx)</a></li> </ul>

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<p><b>Supplies:</b> <b>Computers</b></p>	<p><b>Computer devices - allowable under certain conditions:</b></p> <ul style="list-style-type: none"> <li>▪ Computing devices must be essential (but not exclusive) to the project.</li> <li>▪ The project must not have reasonable access to other devices or equipment that can achieve the same purpose; devices may not be purchased for reasons of convenience or preference.</li> <li>▪ <b>Must provide ample justification for the necessity of the device for the performance of the award.</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Controller's Office - CAS Guidelines-Appendix A-Unallowable Costs-200.453/ 75.453</a></li> <li>▪ <a href="#">Budget Justification Guidelines (docx)</a></li> </ul>
<p><b>Travel</b></p>	<ul style="list-style-type: none"> <li>▪ Transportation expenses shall be reimbursed based on the <b>most economical mode of transportation</b> and the most commonly traveled route consistent with the authorized purpose of the trip. Any exception must be approved by the Chancellor.</li> <li>▪ Agreements concerning such reimbursement shall be made at the time of negotiation for appointment, and payment of travel expenses to the extent authorized by University regulations <b>should not be incorporated in the salary but paid separately.</b></li> <li>▪ Relocation expenses are not the same as travel expenses; for travel expense reimbursement to a Visiting appointee, see the provisions of <a href="#">APM 230</a>-20-h.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">G-28 Travel Regulations</a></li> <li>▪ <a href="#">UCSF Travel</a></li> <li>▪ <a href="#">UCSF Travel Regulations</a></li> <li>▪ <a href="#">APM 230-20-h</a></li> </ul>
<p><b>Travel by Air</b></p>	<ul style="list-style-type: none"> <li>▪ Presidential Chair funds may be used to reimburse a Visiting title for <b>one round-trip ticket</b> on the condition that they are also employed for an equivalent of full-time service for a minimum of one quarter (10 weeks). This service (i.e., 400 hours) could be accumulated over multiple visits.</li> <li>▪ <b>Coach class or any discounted class shall be used in the interest of economy</b> - regardless of the purpose or fund source.</li> </ul>	<ul style="list-style-type: none"> <li>▪ UCSF VPAA</li> <li>▪ <a href="#">APM 230 -20-h-(1)</a></li> <li>▪ <a href="#">G-28 -V-H-1-a; V-D-2a</a></li> <li>▪ <a href="#">UCSF Travel</a></li> </ul>
<p><b>Travel Regulations</b></p>	<ul style="list-style-type: none"> <li>▪ <a href="#">UC Policy G-28-Travel Regulations</a>, applies to all official University travel, including travel for visiting academic appointees.</li> <li>▪ <a href="#">UC APM- 230-Visiting Appointments</a>, contains information concerning allowable expenses, limitations, funding, and approval authority.</li> <li>▪ <b>Check policies</b> to ensure that proposed travel is compliant with UC/UCSF regulations and can be paid or reimbursed.</li> </ul> <p><a href="#">APM 230</a>-20.h. Travel Expenses for Visiting Appointments  <a href="#">G-28-H.1.a.</a> Visiting Academic Appointees  <a href="#">G-28-E.1.</a> Subsistence Expenses (lodging, MI&amp;E)  <a href="#">G-28-Appx B</a> Lodging and M&amp;IE Reimbursement CAPS  <a href="#">UCSF Travel</a> Booking, policies, how-to guides</p>	

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<p><b>Other Expenses</b></p>	<ul style="list-style-type: none"> <li>▪ Reimburse for actual and necessary expenses as allowed by department and UC policy. <i>For example (not limited to):</i> <ul style="list-style-type: none"> <li>– Data Network Recharge</li> <li>– Off-campus network</li> <li>– ITFS Field Services Support</li> <li>– GAEL</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">BUS-79</a></li> <li>▪ <a href="#">BFB-G-13 Sec-III-A-2</a></li> <li>▪ <a href="#">UCSF Accounts Payable</a></li> <li>▪ <a href="#">Budget Justification Guidelines (docx)</a></li> </ul>

**For More Information:**

**UC/UCSF Policies and Faculty Appointments, contact:**

- School x/Associate Deans (i.e., Academic Affairs or Administration/Finance)
- Department Administrator (i.e., Chair/Chief, MSO, Finance/Business Analyst)
- Department’s HR Academic Generalist ([find your HR Representative](#))

**UCSF Presidential Chair Award**

- Contact: Abby Draper, [abigail.draper@ucsf.edu](mailto:abigail.draper@ucsf.edu), UCSF Office of Faculty and Academic Affairs (OFAA)
- Website: <https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair>

**Source References:**

**Appointment**

- APM 230 - Visiting Appointments  
<https://www.ucop.edu/academic-personnel-programs/files/apm/apm-230.pdf>
- APM-265 – Presidential Chairs  
<https://www.ucop.edu/academic-personnel-programs/files/apm/apm-265.pdf>
- APM 666 - Honoraria  
<https://ucop.edu/academic-personnel-programs/files/apm/apm-666.pdf>
- UCSF Human Resources Search Tool: *Find Your HR Representative*  
<https://hr.ucsf.edu/find-rep>
- UCSF Office of Faculty and Academic Affairs  
<https://facultyacademicaffairs.ucsf.edu/>
- UCSF Policy 300-29 – Honoraria  
<https://policies.ucsf.edu/policy/300-29>

**Budget**

- Budget Development - UCSF Office of Sponsored Research Website  
<https://osr.ucsf.edu/>
- Budget Justification Guidelines - UCSF Presidential Chair Award  
<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/BudgetJustification-PresChairAward.docx>
- Budget Template - UCSF Presidential Chair Award  
<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/BudgetTemplate-PresChairAward.xlsx>

### **Evaluation Criteria:**

- Evaluation Guidelines  
<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/EvaluationGuidelines-PresChairAward.pdf>

### **Meetings, Meals, Refreshments**

- UCSF Meeting and Entertainment Expenses  
<https://supplychain.ucsf.edu/meeting-and-entertainment-expenses>
- BFB-BUS-79: Expenditures for Business Meetings, Entertainment, and Other Occasions  
<https://policy.ucop.edu/doc/3420364/BFB-BUS-79>
- UCSF Policy 200-31 - Alcohol  
<https://policies.ucsf.edu/policy/200-31>

### **Payment/Reimbursement Policies and Procedures**

- UCSF Accounts Payable  
<https://supplychain.ucsf.edu/accounts-payable>
- UCSF Controller's Office – Cost Accounting Standards (CAS)  
<https://controller.ucsf.edu/quick-reference/contracts-grants-accounting/cost-accounting-standards-cas-guidelines>

### **Travel**

- APM 230 - Visiting Appointments (*Section 230-20.h*)  
[https://www.ucop.edu/academic-personnel-programs/\\_files/apm/apm-230.pdf](https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-230.pdf)
- UCSF Travel Website  
<https://supplychain.ucsf.edu/travel>
- UCSF Travel Guidelines  
<https://supplychain.ucsf.edu/travel-guidelines>
- G-28: Travel Regulations  
<https://policy.ucop.edu/doc/3420365/BFB-G-28>