**Version Date: 8/23/23**

Adapted from Office of Sponsored Research budget justification template 0925-0001/0002 (v.6/20/2023)

**Please list justification categories in the same order as they appear in the detailed budget**. **Use these guidelines as a template, if desired.**

* **Items in RED are notes to the preparer – please delete red text from the version you submit.**
* **Items highlighted in yellow should be customized for your proposal.**
* **Please omit any content that is not relevant to your budget.**

**Questions**:

* **Contact Abby Draper, Executive Assistant, Office of Faculty and Academic Affairs**
* **Visit the [UCSF Presidential Chair Website](https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/PolicyBudgetGuide-PresChairAward.pdf)**

­­­­­­­­­­­­­­­­­­­­­­­­­­­­

**Budget Justification Guidelines**

**NOMINEE'S FULL NAME:**

Fiscal Year of Award:

Department/School of Appointment:

Approximate Appointment Dates (Start/End):

**PERSONNEL** Click [here](https://osr.ucsf.edu/develop-budget%22%20%5Cl%20%22Personnel) for additional guidance.

**For nominee and any additional personnel** (details below):

* Name, Degree
* University payroll title **(i.e., Visiting Professor, Title Code 1118)**
* Number of calendar months per year and percentage of effort
* Total salary requested
* Fringe benefits (details below)
* Nominee’s role– describe how they are essential to the aims of the project

***Example for Nominee:***

* **Doctor (Name), Degree, Payroll Title,**
* **Salary requested at ## calendar months, % effort, fringe benefits**
* **Nominee’s role in project/how they are essential:** Dr. will…

***Example for Other Personnel:***

* **Name [if known], Degree, Payroll Title or Position,**
* **Salary requested at ## calendar months, % effort, fringe benefits**
* **Individual’s role in project/how they are essential**: [Individual] will…

**Salary:**

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.

* **Describe how the proposed salary rate is reasonable and justified in relation to other comparable titles/positions and in relation to the candidate’s current salary.**
* **Proposed salary should be justified based on objective factors (such as compensation levels for comparable positions, appointment duration and percent time).**

**Fringe benefit statement implementing the Composite Benefit Rates:**

**Fringe Benefits:**

Consist of two benefit assessments- UC-managed Composite Benefit Rates (CBR) and UCSF-managed Faculty Childbearing Childrearing (CBCR) assessment.

* UCSF uses UC-approved **[Composite Benefit Rates](https://brm.ucsf.edu/cbr/rates) (CBRs)** to charge fringe benefits on proposal budgets. Benefits supported include retirement, payroll taxes and assessments, and health & welfare. CBRs are an average of all eligible benefits applicable to a benefits group. Employees are assigned to a benefits group based on job code and benefits eligibility. The composite benefit rate equals the total cost of benefits for the group divided by the total salaries for that group.

|  |  |
| --- | --- |
| Employee Groups | **CBR Rates for** **FY 2023-24 through FY 2026-27**  |
| Faculty Tenured Ladder Rank, In Residence and Clinical (includes Professional Physicians & Dentists) | 25.1% |
| Faculty Non-tenured Ladder Rank and Adjunct | 32.3% |
| Academic and Staff General | 40.6% |
| Management and Professional | 32.7% |
| Postdoctoral Fellow | 18.9% |
| Partial Benefit and Student | 3.7% |

* UCSF implements a non-systemwide Faculty Family-Friendly policy to provide faculty with a Childbearing and Childrearing (CBCR) leave benefit, which is assessed separately and is not included in the chart above. **The CBCR assessment rate is 0.8% of requested salary for faculty and is not included in the CBR.** The faculty CBCR leave is an allowable benefit as provided in 2 CFR § 200.431 and 2 CFR § 200.437 as this leave is provided under established published policies and are allocated equitably and consistently to both federal and non-federal activities. This benefit cost is assessed separately from the CBR for financial management to prevent the faculty’s current funding to pay for the entire leave at one time. The rate is reviewed annually and adjusted accordingly based on benefits used during the year.

Childbearing leave is granted to faculty who are members of the UCSF Health Sciences Compensation Plan (HSCP), for the purpose of childbirth and recovery or related medical conditions. Childbearing leave is provided to a faculty member for the period of time before, during and after childbirth.

Childrearing leave is the time a UCSF HSCP faculty member, who is a non-birth parent, is on leave to bond with or care for any child(ren) who becomes a member of their family through birth, adoption, or foster care placement.

* [Determining/Calculating Fringe Benefit Rates – Office of Sponsored Research](https://osr.ucsf.edu/fringe-benefit-rates)
* [CBR Rates - UCSF Budget and Resources Management](https://brm.ucsf.edu/cbr/rates)
* **Questions about salary or benefits**, contact your department’s HR Academic Generalist; or your school’s vice/assoc. dean of academic affairs or of administration & finance; department chair, MSO, or finance analyst**.**
* **How to reach an HR Academic Generalist: visit <https://hr.ucsf.edu/find-rep>**

In the “Find Your HR Representative Search” box, enter the nominee’s host department name and wait for pre-populated options to appear. Select the department and press enter. Search results will provide a list of HR contacts. Select the Academic Generalist.

**SUPPLIES** (Click [here](http://osr.ucsf.edu/develop-budget%22%20%5Cl%20%22supplies) for more information)

**Supplies are defined as expendable items costing less than $5,000.**

* **List supplies by category (e.g., chemicals, glassware, survey forms, electronic components) with an estimated cost of each.**
* **Describe how supplies are necessary to achieve the aims of the project and will be used specifically and exclusively for the project.**

**TRAVEL** (See references below. Click [here](http://osr.ucsf.edu/develop-budget%22%20%5Cl%20%22travel) for more information)

**Description should include how the travel advances the aims of the project, who is traveling, # trips, and itemize trip expenses:**

* **Purpose and destination**
* **#** **of Travelers**
* **# of Trips**
* **# of Travel days**
* **RT Airfare to/from (East Coast, So Cal, specify City, State)**
	+ ***See airfare policy below***
* **Lodging per night x # of nights**
* **Per Diem (based on [established rates](https://www.gsa.gov/travel/plan-book/per-diem-rates))**
* **Other (registration fees, etc.)**

**Airfare policy:** Presidential Chair funds may be used to reimburse a Visiting title for **one round-trip ticket** 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. No exceptions.

Coach class or any discounted class shall be used in the interest of economy - regardless of the purpose or fund source.

**References:**

* [APM 230-20-h-(1)](https://www.ucop.edu/academic-personnel-programs/_files/apm/apm-230.pdf)
* [UCSF Supply Chain -Travel](https://supplychain.ucsf.edu/travel)
* [UC Policy G-28: Travel Regulations](https://policy.ucop.edu/doc/3420365/BFB-G-28%22%20%5Ct%20%22_blank)

**OTHER EXPENSES** (Click [here](http://osr.ucsf.edu/develop-budget%22%20%5Cl%20%22otherdirect) for more information)

**Data Network Recharge $40.00/year FY-2024-2025 *(See the table below for the rate***). The data network services recharge or data network recharge is a vital component of the University’s Enterprise Network Services (ENS), which provides funding for critical equipment in support of UCSF’s electronic information flow. Per agreement signed January 24, 2008 with The Department of Health & Human Services (DHHS), Division of Cost Allocation, (cognizant agency to the University), the University does not disclose ENS costs as F&A pool costs and can charge for ENS costs as direct costs.

This cost must adhere to the UCSF Costing Guidelines for the Allowability of Computing Device Support Recharges on Sponsored Project Awards and are permissible under our approved Cost Accounting Standards Board Disclosure Statement (CASB Form DS-2) ensuring that there is no duplicate reimbursement from Federal and non-Federal sponsors. The data network recharge is based on the current rate per FTE, consistent with the current billing rates for the data network recharge. Recharge rates are computed in accordance with the requirements of 2 CFR Part 200 and will be reviewed and adjusted annually.

Calculations are based on the percent effort to be charged to the project for each person named in the proposal. The data network recharge rate is implemented and effective as of **[January 31, 2023](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf) *[(date of current Budget and Planning Assumption](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf))****,* and will be approximately **$40.00 *(from [current Budget and Planning Assumption](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf))***per month, pro-rated per FTE with yearly fluctuation based on actual costs of this service.

Future year rates:

**For Faculty, Staff, Postdocs, ZSFG, enter the applicable following rates (DELETE)**

 7/1/23 - 6/30/24: $40/month/FTE

 **7/1/24 - 6/30/25: $40/month/FTE**

 7/1/25 - 6/30/26: $41/month/FTE

 7/1/26 - 6/30/27: $41/month/FTE

* Calculate Data Network Recharge Expense:

Example: % effort x applicable rate = monthly cost x 12 = annual cost

|  |  |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
|  |  |
|  |  |

|  |  |
| --- | --- |
|  |  |
|  |  |  |
|  |

**IT Field Services (ITFS) Desktop Support, formerly Computing and Communication Device Support Services (CCDSS) *Basic or Premium/year,* FY-2024-2025 *(applicable fund year***)On July 1, 2013, the University initiated direct charging forITFS as an integral component of its Enterprise Network Services (ENS) to provide support to campus voice and data technology functions.  ITFS includes software installation/ updates, internet security, hardware setup/configuration, and centrally managed patching, storage and backup.  Direct charging of these support services in conjunction with the Data Network Recharge are covered under Part 3.2.0 – Service Centers, Communication Services, of the University’s Cost Accounting Standards Board Disclosure Statement (CASB Form DS-2) ensuring that there is no duplicate reimbursement from Federal and non-Federal sponsors. The ITFS charge is based on the current rate per FTE, consistent with the current billing rates for ITFS. Recharge rates are computed in accordance with the requirements of 2 CFR Part 200 and will be reviewed and adjusted annually.

Calculations are based on the percent effort to be charged to the project for each person named in the grant. The ITFS recharge rate is implemented and effective as of **[January 31, 2023](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf) *[(date of current Budget and Planning Assumption](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf))****,* and will be approximately **current rate** ***(see future rates below, [from current Budget and Planning Assumption referred to as ITFS](http://osr.ucsf.edu/sites/osr.ucsf.edu/files/Budget_Planning_Assumptions.pdf))***per month, pro-rated per FTE with yearly fluctuation based on actual costs of this service.

Future year rates:

|  |  |  |  |
| --- | --- | --- | --- |
|  | 7/1/23 - 6/30/24: $61/month/FTE |  | 7/1/23 - 6/30/24: $102/month/FTE |
| Basic | **7/1/24 - 6/30/25: $62/month/FTE**  | Premium | **7/1/24 - 6/30/25: $105/month/FTE** |
|  | 7/1/25 - 6/30/26: $64/month/FTE |  | 7/1/25 - 6/30/26: $108/month/FTE |
|  | 7/1/26 - 6/30/27: $66/month/FTE  |  | 7/1/26 - 6/30/27: $111/month/FTE |

* Calculate ITFS Support Expense:

Example: % effort x applicable rate = monthly cost x 12 = annual cost

**General Auto and Employment Liability (GAEL) insurance assessments:**

Budget GAEL separately as an “other expense.”(Click [here](https://riskadvisory.ucsf.edu/general-liability-self-insurance) for more information).

We are requesting $\_\_\_ for General, Automobile, & Employee Liability (GAEL) expenses. GAEL funds the University’s self-insurance program which provides broad coverage for the University’s legal or “tort” liability which arises from University activities. Divided into three areas: General Liability, Auto Liability, and Employment Practices Liability, GAEL provides protection of mistakes (negligence) by UCSF employees resulting in personal or bodily injury or damage to third parties. Coverage is applicable worldwide. **The GAEL insurance assessment is calculated by applying the** **current GAEL rate x $100 of salaries budgeted**.

GAEL rates:

            7/1/22 - 6/30/23: $0.87

            7/1/23 - 6/30/24: $0.89

**7/1/24 - 6/30/25: $0.91**

            7/1/25 - 6/30/26: $0.93

            7/1/26 - 6/30/27: $0.93

7/1/27 - 6/30/28: $0.93

* Calculate GAEL insurance assessment:

|  |
| --- |
|  |
|  |  |  |  |

Example: GAEL Rate FY 24-25: ($0.91 ) x Salary budgeted ($ xxx,xxx / $100) **=** GAEL expense