

Office of Faculty and Academic Affairs  
**UCSF Presidential Chair Award**  
**POLICY AND BUDGET GUIDE**

Revised 8/25/21

Topic / Item:	Policy / Comment:	Source Reference:
<b>Appointment Duration</b>	<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>	<p>Source:</p> <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 Website</a></li> </ul>
<b>Appointment Title</b>	<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>	<p>Sources:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">APM 230</a></li> <li>▪ <a href="#">UCSF Presidential Chair Award Website</a></li> </ul>
<b>Appointment Eligibility</b>	<ul style="list-style-type: none"> <li>▪ Presidential Chair candidates must be in the Professor series.</li> </ul>	<p>Source: <a href="#">APM-230-4 (b)</a></p>
<b>Appointment Purpose and Activities</b>	<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>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">APM-265</a> - Sections 1 &amp; 6</li> <li>▪ <a href="#">UCSF Presidential Chair Award Website</a></li> <li>▪ <a href="#">APM 230-18 (c)</a></li> </ul>
<b>Appointment Tenure</b>	<ul style="list-style-type: none"> <li>▪ Presidential Chairs are Visiting Professors and cannot acquire tenure.</li> <li>▪ Neither tenure nor security of employment is acquired by appointment to a Visiting title, although eligible service with certain Visiting titles is credited under the University's "eight-year" rule.</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">APM 230-20 (g)</a></li> <li>▪ For "eight-year rule, see: <a href="#">APM - 133</a></li> </ul>
<b>Appointment Time on Campus</b>	<ul style="list-style-type: none"> <li>▪ <b><i>Due to the ongoing COVID-19 pandemic, an on-campus presence is not required for 2022-23 candidates.</i></b></li> <li>▪ In the most competitive submissions, candidates plan to spend significant time on campus – with preference for at minimum 3 months.</li> <li>▪ Time on campus may be a single visit or multiple visits during the course of their appointment.</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ UCSF VPAA</li> <li>▪ <a href="#">APM-230-20h(1)</a></li> </ul>

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<b>Funding</b>	<ul style="list-style-type: none"> <li>▪ Funds are available to the host department 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.</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Presidential Chair Award Website</a></li> </ul>
<b>Budget Development and Template</b>	<ul style="list-style-type: none"> <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> <li>▪ Department approver's responsibility is to ensure that the salary, travel and meeting/entertainment <a href="#">expense reimbursements</a> follow UC policies.</li> <li>▪ Use of the UCSF Presidential Chair Award <a href="#">budget template</a> and <a href="#">budget justification guidelines</a> is recommended.</li> <li>▪ For information and resources on budget development and budget justification, visit the <a href="#">UCSF Office of Sponsored Research - Develop a Budget</a>.</li> </ul>	<p>Resources:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">Find Your HR Rep</a></li> <li>▪ <a href="#">Campus HR</a></li> <li>▪ <a href="#">UCSF Office of Sponsored Research - Develop a Budget</a></li> <li>▪ <a href="#">UCSF Accounts Payable</a></li> <li>▪ <a href="#">UCSF Presidential Chair Award Website</a></li> <li>▪ <a href="#">budget template</a></li> <li>▪ <a href="#">budget justification guidelines</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 and for re-budgeting may be initiated by the award recipient, the department or the Sponsor.</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 Office of Sponsored Research</a></li> <li>▪ UCSF VPAA</li> </ul>
<b>Honorariums</b>	<ul style="list-style-type: none"> <li>▪ <b><i>Payment in the form of an honoraria is not appropriate for a Visiting Professor.</i></b></li> <li>▪ Definition: An honorarium is payment (generally not required) by the University to an academic appointee for <i>occasional</i> lectures and similar public appearances beyond normal academic responsibilities to the University.</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>

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<b>Meals and Refreshments</b>	<ul style="list-style-type: none"> <li>▪ The University permits expenditures for meals and light refreshments provided to academic or staff employees, students, donors, guests, visitors, volunteers, and other individuals 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 \$27</li> <li>– Lunch \$47</li> <li>– Dinner \$81</li> <li>– Light Refreshment \$19</li> </ul> </li> <li>▪ <b>Frequency</b> <ul style="list-style-type: none"> <li>– Meals should be limited to no more than once a month or twelve times per year, per group.</li> <li>– Light refreshments should be limited to no more than twice per month, per group.</li> <li>– Meals or light refreshments provided to a group should be counted on an event basis, e.g., a two-day meeting should be counted as one event.</li> </ul> </li> <li>▪ <b>Alcohol</b> <ul style="list-style-type: none"> <li>– Approval for the purchase of alcohol with Presidential Chair funds is at the discretion of the Vice Provost.</li> <li>– To date, the Vice Provost has not approved of the purchase of alcohol with Presidential Chair funds.</li> </ul> </li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Accounts Payable</a></li> <li>▪ <a href="#">BUS-79</a> Sections III-A-2; Appendix-A; V-B-4</li> </ul> <p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">BUS-79</a></li> <li>▪ UCSF Policy <a href="#">200-31</a></li> <li>▪ <a href="#">UCSF Accounts Payable</a></li> </ul>
<b>Meetings and Entertainment</b>	<ul style="list-style-type: none"> <li>▪ For guidance on allowable and unallowable expenses, please review the UCSF Meetings and Entertainment Expense information and UC Policy BUS-79 (at right).</li> </ul>	<p>Source:</p> <ul style="list-style-type: none"> <li>▪ <a href="#">UCSF Meeting &amp; Entertainment Expenses</a></li> <li>▪ <a href="#">BUS-79</a></li> </ul>
<b>Subsistence: Lodging, Meals, Incidentals</b>	<p>For <a href="#">CONUS</a> of more than 24 hours and less than 30 days:</p> <ul style="list-style-type: none"> <li>– The reimbursement of meal and incidental expenses (M&amp;IE) is based on actual costs incurred, subject to the daily maximum reimbursement limit of \$62.</li> <li>– Actual lodging expenses for location of travel can be up to \$275 per night supported by a receipt.</li> </ul> <p>For <a href="#">CONUS</a> travel – Long-Term Travel:</p> <ul style="list-style-type: none"> <li>▪ When the traveler is expected to be in one location for 30 or more consecutive days but not in excess of one year. <ul style="list-style-type: none"> <li>– Can be reimbursed for actual costs incurred up to 100% of meal and incidental expenses (up to \$62)</li> <li>– Up to 100% of lodging expenses (up to \$275) combined Per Diem.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">GSA Per Diem Rates</a></li> <li>▪ <a href="#">G-28-V-Appendix B</a></li> <li>▪ <a href="#">UCSF Travel Regulations</a> <a href="#">UCSF Travel</a> website</li> </ul>

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<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.               <ul style="list-style-type: none"> <li>Proposed salary rate cited in the presidential chair budget proposal should be reasonable and justified.</li> </ul> </li> </ul>	Source: <ul style="list-style-type: none"> <li><a href="#">APM 230-17 (a)</a></li> <li>UCSF VPAA</li> </ul>
<b>Supplies</b>	<ul style="list-style-type: none"> <li>Reimburse for actual and necessary expenses as allowed by department and UC policy. The budget should briefly describe the supplies. <i>Examples:</i> instructional supplies, research supplies. The budget justification should provide a detailed breakdown of the purpose, necessity and cost of the supplies.</li> </ul>	Source: <ul style="list-style-type: none"> <li><a href="#">BUS-79</a></li> <li><a href="#">UCSF Accounts Payable</a></li> </ul>
<b>Supplies: Computer Devices</b>	<p><b>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 does 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>	Source: <a href="#">UCSF Uniform Guidance</a>
<b>Travel</b>	<ul style="list-style-type: none"> <li>Transportation expenses shall be reimbursed based on the most economical mode of transportation and the most commonly traveled route consistent with the authorized purpose of the trip. Any exception must be approved by the Chancellor.</li> </ul>	Source: <ul style="list-style-type: none"> <li><a href="#">BFB-G-28-V-D</a></li> <li><a href="#">UCSF Travel</a> website</li> <li><a href="#">UCSF Accounts Payable</a></li> </ul>
<b>Travel and Relocation</b>	<ul style="list-style-type: none"> <li><b>Travel expenses are separate from salary.</b> Travel expenses cannot be reimbursed beyond the extent authorized by University regulations.</li> <li><b>Agreements concerning such reimbursement shall be made at the time of negotiation for appointment,</b> and payment of travel expenses to the extent authorized by University regulations should not be incorporated in the salary but paid separately.</li> <li><b>Relocation expenses are not the same as travel expenses;</b> for travel expense reimbursement to a Visiting appointee, see the provisions of APM - 230-20-h.</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">UCSF Travel</a> website</li> <li><a href="#">UCSF Travel Regulations</a></li> <li><a href="#">APM 230-20-h</a></li> </ul>
<b>Travel by Air</b>	<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>Coach class or any discounted class shall be used in the interest of economy - regardless of the purpose or fund source.</li> </ul>	Sources: <ul style="list-style-type: none"> <li>UCSF VPAA Office</li> <li><a href="#">APM 230-20-h-(1)</a></li> <li><a href="#">BFB-G-28</a> Sections: V-H-1-a; V-D-2a</li> <li><a href="#">UCSF Travel</a> website</li> </ul>

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<b>Other Expenses</b>	<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>– HR Service Center Charges</li> <li>– Data Network Recharge</li> <li>– Off-campus network</li> <li>– Computing and Communication Device Support</li> </ul> </li> </ul>	Source: <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> </ul>

## Questions?

**For questions specific to your school or department’s policies on budget, appointment, compensation, benefits, contact:**

- Host school dean’s office (administration/finance) or department administrator (i.e. chair/chief, MSO)
- Host department’s HR Academic Generalist ([find your HR Representative](#))

**For all questions about UCSF Presidential Chair Award administration and policy.**

- **Contact:** [Abby Draper](#) - Executive Assistant to the UCSF Office of Faculty and Academic Affairs
- **Website:** [UCSF Presidential Chair Award](#)

## Source References

### Appointment / Salary / Fringe Benefits

UCSF Presidential Chair Award Website  
<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair>

Budget Justification Guidelines - UCSF Presidential Chair Award  
<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/Pres-Chair-Award-Budget-Justification-Guidelines.docx>

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 Policy 300-29 – Honoraria  
<https://policies.ucsf.edu/policy/300-29>

APM 133 - Limitation on Total Period of Service with Certain Academic Titles  
<https://www.ucop.edu/academic-personnel-programs/files/apm/apm-133.pdf>

UCSF Office of Faculty and Academic Affairs  
<https://facultyacademicaffairs.ucsf.edu/>

UCSF Human Resources Search Tool: *Find Your HR Representative*  
<https://hr.ucsf.edu/find-rep>

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Revised 8/25/21

**Budget Template and Budget Development**

Budget Template - UCSF Presidential Chair Award

<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/Pres-Chair-Award-Budget-Template-20210825.xlsx>

Budget Justification Guidelines - UCSF Presidential Chair Award

<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair/Pres-Chair-Award-Budget-Justification-Guidelines.docx>

UCSF Approved Recharge Rate Table (MyAccess sign-on required)

<https://ucsf.box.com/s/5q1178zs7k4yf3mww7f3nzc0jkb5q9k>

UCSF Office of Sponsored Research – (information on budget development, modification, rates)

<https://osr.ucsf.edu/>

UCSF Presidential Chair Award Website

<https://facultyacademicaffairs.ucsf.edu/quick-links/awards/presidential-chair>

**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>

**Travel**

APM 230 - Visiting Appointments (*Section 230-20.h*)

<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>

BFB-G-28: Travel Regulations

<https://policy.ucop.edu/doc/3420365/BFB-G-28>

USA GSA Per Diem Rates

<https://www.gsa.gov/travel/plan-book/per-diem-rates>