

# On or Off-Campus F&A?

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June 9, 2021 RAC Forum



# Quick Overview of F&A

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- Facilities and Administration (F&A)/indirect costs (or overhead) represent project expenses that cannot be easily identified with any specific sponsored project but are incurred for common or joint objectives related to all sponsored projects at UC Berkeley.
- UC Berkeley negotiates our F&A rates with the U.S. Department of Health and Human Services (DHHS) because we receive the most federal funds from this agency.
- For every dollar spent in direct costs, UCB recovers a percentage based on the F&A rate used.

# Current On Campus F&A Rates

## Applied to MTDC

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- Organized Research On Campus:
  - 59% until June 30, 2021
  - 60.5% after June 30, 2021 until June 30, 2022
- Instruction: 48% until June 30, 2022
- Other Sponsored Activities: 40% until June 30, 2022
- SSL: 34% until June 30, 2022



# Current Off-Campus F&A Rates

## Applied to MTDC

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- The Off-campus rate is the “A” without the “F”—the “A” is capped at 26%
- Organized Research On Campus: 26% until June 30, 2022
- Instruction: 26 % until June 30, 2022
- Other Sponsored Activities: 16.5% until June 30, 2022
- SSL: 24% until June 30, 2022

# On vs Off Campus

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- The **on-campus F&A rate** is always charged when the sponsor allows the University to apply its negotiated on-campus F&A rate unless an F&A rate exception is granted by the VCRO or the off-campus F&A rate applies.
- The **off-campus F&A rate** is used when the project is conducted at a remote field site or at professional facilities not owned or leased by the University. If leased space and leased costs/rent costs are directly charged to the project's sponsor the off-campus rate must be used.



# Requesting an Off-Campus Rate

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Submit a completed Off-Campus F&A Rate Questionnaire

Found on the SPO Website:

[https://spo.berkeley.edu/policy/fa\\_questions.pdf](https://spo.berkeley.edu/policy/fa_questions.pdf)

# Off-Campus Decision Criteria

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- Where will the majority of the project will take place?
  - Cannot be conducted at a facility owned or leased by UC (includes field stations and other UC properties.)
  - Must be located at a location sufficiently distant from the University to precluded daily travel to/from UC Berkeley.
  - Note: Work from home is not considered off-campus.



# Off-Campus Decision Criteria

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- Will the work take place at the off campus location on a continuous basis?
  - Project personnel must be based at the off campus location for **longer than one semester or three summer months**.
  - Project personnel **will not return to the local area** during this time.
  - The **budget should reflect the cost** of project personnel living/working at the off-campus location.



# Off-Campus Decision Criteria

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- Is this a continuation of an existing or prior project with the same sponsor?
- Where will the majority of personnel effort on the project take place?
  - Provide a breakdown of the person months for all project personnel (paid and unpaid) working at both the campus and the off-campus location.
- How will the project be carried out without using any University space, equipment, administrative support, and/or communication services.
  - These costs are often invisible but are very real!

# SPO Website Guidance

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- What are F&A Costs?: <https://spo.berkeley.edu/guide/fa.html>
- F&A Waiver Requirements:  
<https://spo.berkeley.edu/policy/fawaiver.html>
- Current Rate Agreement:  
<https://spo.berkeley.edu/policy/fa2019.pdf>



# Have a Great Summer!

