

TAKING THE MYSTERY OUT OF “ON” & “OFF” CAMPUS F&A

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PRESENTERS

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IT SHOULD BE EASY TO MAKE THIS DECISION

- On Campus Space



- Off Campus Field Research



BUT SOMETIMES IT IS NOT SO OBVIOUS

- On or Off Campus?



- LBNL

- On Campus or Off Campus?



- Buckhead Schools, Atlanta GA

PRELIMINARY QUESTIONS TO ASK THE PI:

1. Will the sponsor be charged for rent or lease costs for this project? Clue: These costs should appear in the project budget.

If the answer is "Yes" the off campus F&A rate **MUST be used.**

2. Is this project a continuation of an existing or prior project with the same SOW funded by the same external sponsor with an off-campus F&A rate?

**If the answer is "Yes" the off campus rate
can **CONTINUE** to be used.**



IF THE PI ANSWERS “NO”
MORE INFO WILL BE NEEDED.



WHERE TO GO FOR HELP: THE OFF CAMPUS F&A QUESTIONNAIRE



<https://spo.berkeley.edu/policy/fa.html>

PRELIMINARY PI QUESTIONS

Will this project be:

Conducted at a professional facility NOT owned or leased by UC Berkeley? This includes all UC Berkeley properties and field stations?

OR

Located at a distant field site (not a domestic residence) that precludes normal access or travel to/from the University?

**If the answer is "Yes" to either of the above,
one more question needs to be answered.**



THE “DECIDER” QUESTION

Will this project be located off-campus continuously (i.e., project personnel will not return to a home/campus base) for longer than one semester or three summer months?

**If the answer is “Yes” to this question,
the off campus rate is appropriate.**

**If the answer is “No”
the on campus rate will apply.**



WHAT IF THE PROJECT IS PARTIALLY “ON” AND PARTIALLY “OFF” CAMPUS?

- If the project is conducted partially on and partially off campus, the University will determine which rate to use based on where the majority of work takes place:
- The information used to make this determination may include:
 - Berkeley personnel effort and/or salary costs related to the on and off campus locations and/or
 - PI answers to the Off Campus F&A Questionnaire

CAN THE “ON” & “OFF” CAMPUS RATES BE USED IN THE SAME PROJECT?

- Yes, if all of the following conditions are met, use of both the on- and off-campus F&A rates may be allowable for any given project year:
 - The project is significant (total salaries, excluding fringe benefits, for the project exceed \$250,000/project year); AND
 - The on-campus and off-campus portions can be clearly identified by means of separate budgets; AND
 - The salary costs associated with each portion of the project must total at least 25% of the direct costs of the annual budget.



IF YOU STILL HAVE QUESTIONS...



- SPO Resources:
 - Current F&A Rate Agreement: <https://spo.berkeley.edu/policy/fa2020.pdf>
 - Overview of campus F&A Policies: <https://spo.berkeley.edu/policy/fa.html>
 - Off campus F&A Rate Questionnaire: https://spo.berkeley.edu/policy/fa_questions.pdf
 - May 24, 2022 BRAG Subject Matter Expert Presentation: https://spo.berkeley.edu/policy/fa_presentation.pdf
- Please contact your assigned CGO
 - <https://spo.berkeley.edu/staff.aspx>