



UNIVERSITY OF
CALIFORNIA
HASTINGS

COLLEGE OF THE LAW

FACULTY RESEARCH ACCOUNTS

STANDARD OPERATING PROCEDURES & GUIDELINES

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FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

GENERAL

PURPOSE

The purpose of Faculty Research Accounts (FRAs) is to promote and support faculty research, teaching, and scholarship at UC Hastings College of the Law.

Formerly known as Faculty Development Accounts, Faculty Research Accounts (FRAs) are subject to the guidelines presented in this Guideline. It outlines how the funds can be spent and how the business transactions are to be administered. This document replaces the FDA guidelines, last updated in October 2006.

BACKGROUND

In recent years, the College generally allocated \$5,000 per fiscal year to individual faculty members in support of development, scholarships, teaching, and research endeavors. Faculty Support provides significant support to the faculty to process related transactions. While the College intends to continue that same level of financial and administrative support, the guidelines for Faculty Research Accounts (FRAs) will now also incorporate the College's strategic objectives to promote engaged scholarship and achieve service excellence.

In November 2013, Provost and Academic Dean Hillman appointed an ad hoc committee to review the effectiveness of Faculty Development Accounts and review current administrative processes to look for streamlining opportunities. The committee members included Hadar Aviram, Maria Burgos, Scott Dodson, Katey Mason and Debbie Tran. The faculty members of the Committee participated to articulate faculty interests in access to research funds and to help gather information about how other law schools manage research funds.

A primary goal of the changes articulated here is to ensure funds are used to promote and support faculty research, teaching, development, and scholarship. Over the years, fund expenses have not always been used directly for these purposes. As part of this review process, the College examined how UCLA, UC Davis, and Berkeley Law schools administered similar accounts. The recommendations that appear here are those of the Academic Dean after meeting with the committee and College leadership and revising in response to feedback from faculty.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

SUMMARY OF CHANGES

Faculty Development Accounts were implemented in July 1997 and the Guidelines were last updated in October 2006. Following is a summary of key changes in this Guideline as compared to the October 2006 version.

| Item | October 2006 | July 2015 |
|------------------------------------------------------------------|------------------------------------------|---------------------------------------------------------------------------------------------|
| Name | Faculty Development Accounts (FDA) | Faculty Research Accounts (FRA) |
| Use of funds | Flexible use by faculty | Restricted to research, teaching, and scholarship, including events for students and guests |
| Amount allocated to eligible faculty ¹ | \$5,000 | \$3,500 |
| Faculty Research Funds Pool (FRFP) ² | \$0.00 | \$1,500 x number of eligible faculty members |
| Rollover of unused funds | Not allowed | Yes |
| Student Travel | Optionally funded by each faculty member | Funding allocation will be made by the Academic Dean |
| State Bar Dues | Not allowed | 100% paid for Clinical Faculty 50% paid for Non-clinical Faculty |
| Computer Replacement | Paid for by IT | Every 5 years, paid for by IT |
| Additional computer purchases from your Faculty Research Account | Not restricted | Limited to every 3 years |
| Printers | Not restricted | Limited to special circumstances. Approval required. |
| Home office supplies | Not restricted | Not allowed |
| Office furniture and décor | Not restricted | Not allowed |
| Maintenance and service of office printers | Paid for by IT | Charged to FRA |

¹ Subject to funding availability.

² Subject to funding availability.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

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|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Student Employment | Students will no longer receive damage pay for hours worked before completing the onboarding process with Human Resources. Students must submit approved timesheets monthly. |
| Travel Reimbursement | Faculty must submit travel reimbursement documents within thirty days of completion of travel. |
| Direct Deposit | Direct deposit is required for non-payroll compensation. |

FACULTY RESEARCH ACCOUNTS OVERVIEW

Faculty Research Accounts (FRAs) are funded with State funds and are designed to provide eligible faculty the spending flexibility needed to support their research, teaching, and scholarship efforts. Eligible faculty receive a funding allocation and are responsible for ensuring expenditures made comply with College policies and procedures.

Beginning July 2015, the amount allocated to individual faculty will be reduced from \$5,000 to \$3,500. The other \$1,500 will be allocated to a newly established Faculty Research Fund Pool (FRFP). The pool, also State funded, will be managed and administered by the Provost and Academic Dean. Funds in the pool are designed to further supplement individual FRAs for those faculty conducting scholarship and research directly supporting the College's strategic efforts.

All expenditures, whether from the pool or the individual accounts, must directly support faculty research, teaching, and scholarship activities and must comply with all College policies and procedures.

ALLOCATION

FRA funding, subject to funding availability, is allocated to faculty teaching at UC Hastings and to the FRFP. A new allocation will be made at the beginning of each fiscal year as authorized through the College's budget process.

Allocations will be pro-rated, as calculated by the Academic Dean, for faculty visiting away for a semester at another institution.

If a situation occurs where additional funds are needed, the faculty member must contact the Academic Dean and request an augmentation or an allocation from the pool. See below for process.

The amounts which exceed the authorized allocation may, as determined by the Academic Dean, be deducted from faculty member's next year's allocation or funded from the FRFP. All reasonable requests will be funded until the FRFP is exhausted.

Faculty are encouraged to use the FRA funds to hire student research assistants. If funds are exhausted for student RAs, requests for augmentation will be first in line for funding from the pool.

FACULTY RESEARCH FUND POOL (FRFP)

FRFP funds are available to provide additional support to the faculty for their scholarship, teaching, and research and support the College's strategic goals and objectives of engaged scholarship.

Requests for an allocation from the pool shall be made in writing to the Academic Dean. Request should describe the research project, the need for additional funding and the amount requested. These requests will be reviewed by the Academic and Research Deans. If the allocation is approved, the faculty member will coordinate the disbursement and reimbursements with the Academic Dean's office. A separate allocation will not be made to the individual faculty member's FRA but rather these expenses will be charged directly to the pool account.

Faculty members are responsible to ensure that they do not exceed the allocated amount from the pool.

FACULTY RESEARCH ALLOCATION SPENDING

BUDGETING AND REPORTING

Individual Accounts

Annually, a budget will be established in each faculty member's spending account. This amount is available to each faculty member to spend on research, teaching, and scholarship activities.

Faculty are responsible for monitoring their individual research accounts in FIRS (Fiscal Information Reporting System) to ensure funds are available and those transactions recorded are correct. Faculty may also request status reports from Faculty Support. Errors should be reported to the Controller's office immediately.

At the end of each fiscal year, any unspent amounts will revert to the FRFP.

Pool Account

Annually, a budget will be established for the pool. It includes the new year's allocation along with any unspent individual faculty funds from the prior year and the amount of any deficits. The Academic Dean's office is responsible for monitoring and managing the pool.

In the event the Academic Dean needs to reallocate the pool funding for a purpose other than faculty research and scholarship, s/he may do so, but will report such action to the faculty at the next faculty meeting. Further, the Academic Dean will annually report to the Faculty the pool's activity including the amount spent and the purpose along with the amount available to be carried forward into the next fiscal year.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

SPENDING GUIDELINES

This section outlines how FRA funds can be spent. The Academic Dean is the authorized signature authority on all FRAs. This means that all invoices, check requests and reimbursements must be approved by the Academic Dean before funds are disbursed.

GENERAL SPENDING RULES

- Funds can only be spent for purposes that are in the best interest of and related to the mission of the College.
- Funds can only be spent on research, teaching, and scholarship activities. (NOTE: The Academic Dean's office will fund an allocation to support student travel for Public Interest events; the FRA funds should be used for research and scholarship activities).
- Personal use of the funds is strictly prohibited.
- All equipment purchased with faculty research funds are the property of the College.
- Expenses will be charged to the fiscal year's allocation in which they are incurred.
- FRAs cannot be converted to cash and paid to the faculty in the form of a stipend.
- Faculty who leave the College forfeit all unused funds.
- The Academic Dean has the discretion to disallow any expenditure that s/he deems not in the best interest of the College.
- The Faculty Research Account program can be discontinued at any time in the event of an unavailability of funding.

Unallowed expenses include:

- Insurance secured from car rental agencies.
- Airline seat upgrades are not allowed except when there is a medical or disability reason. This expense must be pre-approved by the Academic Dean.
- Family member or pet travel expenses are not allowed except as noted in the Business and Entertainment policy.
- Alcohol expenses are not allowed.
- Gifts to others except when expressly approved in advanced from non-state funds..
- Donations.
- Reimbursements for travel will not be made without original, itemized receipts.
- Purchases for office furniture and office décor. Faculty should contact the Academic Dean's office for office furniture purchases.
- Purchase of cell phones, cell phone service and/or internet service provider fees.
- Purchases for equipment and supplies used in a home office even if related to scholarship and research.
- Personal reimbursement for laptops, desktops, printers and other IT related expenses is not allowed. Major purchases, costing above \$300, must be made through Purchasing.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

TRAVEL

- Faculty may use the FRA allocation for travel related to their scholarship, teaching, and research that is in the best interest of the College. In the event the annual allocation is fully spent, the Faculty may request additional travel funds from the Pool. The request would be made as part of the travel approval process.
- The Annual AALS Conference can be charged to FRA or paid for by request through faculty pool fund.

Faculty must comply with the College's policies related to travel and entertainment. These policies further outline allowable expenses. Links to these policies are listed below.

Travel Policy: http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/Fin_policy/sec10.pdf

| Travel Time | Daily Reimbursement |
|------------------------------------------------------------------------|---------------------|
| At least 12 hours of travel, beginning before 7am and ending after 7pm | \$42.00 |
| 24 hours or more of travel | \$64.00 |

View the full Travel Reimbursement schedule at <http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/new-O-0302.pdf>

When traveling by personal vehicle or when renting a car, a current Authorization to Use Privately Owned Vehicle for State Business form must be on file with the CFO's office before mileage reimbursement will be made.

When traveling for College business, faculty should request an exemption from the local hotel occupancy tax. UC Hastings employees may be exempt from paying this tax as "State" government employees.

Allowable Travel Expenses:

- Airline change and baggage fees.
- Transportation via personal vehicle, rental car, shuttle, taxis, and public transportation.
- Reimbursements for food and lodging are allowed as outlined in Section 10 Travel and Exhibit O of the Financial Policy and Procedure Manual.
- Change fees related to cancelled flights due to extreme weather conditions.
- Internet access for business purposes or mobile phone as needed for business travel.

Non-allowed travel expenses:

- Insurance secured from car rental.
- Airline seat upgrades are not allowed except when there is a medical or disability reason. This expense must be pre-approved by the Academic Dean.
- Family member or pet travel expenses are not allowed except as noted in the Business and Entertainment policy.
- Reimbursements for travel will not be made without original, itemized receipts.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

BUSINESS MEALS AND ENTERTAINMENT EXPENSES

College policy allows for business meals and entertainment expenses.

Business Expense and Entertainment Policy: http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/section11_business_meetings_entertainment

The current allowable per person limit for meals related to business meetings, entertainment and other meal expenses are outlined below. This includes food and beverage; it does not include gratuities. Gratuities are limited to not more than 20% of the total cost for food and beverage and will not be reimbursed if a mandatory service fee is imposed. If the meal is for entertainment, a modest meal will be reimbursed providing a list of attendees and the relation of the individual(s) to the college accompanies the original receipt.

| | |
|---------------------------|---------|
| Breakfast | \$28.00 |
| Lunch | \$45.00 |
| Dinner | \$78.00 |
| Light Refreshments | \$18.00 |

STUDENT EMPLOYEES

Faculty are encouraged to hire student employees. Additional funds requested from the FRFP will be given priority for student wages.

- Faculty may hire student employees to assist with research and scholarship.
- Job descriptions for recruitment should be forwarded to Faculty Support where they will be posted on the K-Scope job board. Direct hires will also be directed to K-Scope.
- Student employees must first complete all required HR employment forms BEFORE they begin working.
- Student employees are paid monthly based upon hours worked as recorded on the UCH timesheet.
- The supervising faculty member is required to approve all timesheets before a student will be paid.
- Students must submit timesheets at the end of each pay-period worked. Students are now allowed to save timesheets and submit at one time.
- Faculty should consult with students to determine if students are working for more than one faculty member or department to ensure the employee does not work overtime or exceed his/her work study limits or work overtime.
- Amounts earned in excess of the student's work-study limit are charged 100% to the faculty's account.
- Student wages are exempt from the College's benefit charges.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

GRADUATE RESEARCH FELLOWS (GRFS) OR OTHER TEMPORARY EMPLOYEES

Faculty may hire UCH graduates or other temporary employees to assist with their research, teaching, and scholarship.

- GRFs and temps must *first* complete all required HR employment forms *BEFORE* they begin working. The faculty member should get clearance from HR that the employee is authorized to begin working. Allowing an employee to begin working before their hiring paperwork is completed is problematic for the administration and will delay payment to the employee. By completing the hiring paperwork first, HR will confirm the employee is legally eligible to work.
- GRFs and temps are paid monthly based upon hours worked as recorded on the UCH timesheet.
- GRFs must submit their timesheets at the end of each pay-period worked.
- The supervising faculty member is required to approve all timesheets before a GRF or temp will be paid.
- GRF wages are exempt from benefit charges.
- Temp wages are subject to a benefit allocation. Currently, the allocation is 34% of the salary. Faculty should consider this expense when hiring temporary employees to ensure they have sufficient funds in their RFA account.

SERVICES OF INDEPENDENT CONSULTANTS

- Faculty may hire independent consultants to assist with research and scholarship.
- Faculty must contact Purchasing to first determine if the individual meets the IRS test of an independent consultant. In most cases, the individual is likely to be an employee of the College and not an independent consultant.
- If the individual is determined to be an independent consultant, an Agreement for Services must be executed before the services can be performed.
- Faculty are responsible for completing the approved Agreement template and forwarding it to Purchasing who will work with the individual consultant to execute the Agreement.
- The consultant should not work until the Agreement is fully executed.
- Services will be paid upon receipt of an invoice issued to UC Hastings College of the Law.
- The individual will receive a 1099 form at the end of each tax year for purposes of reporting taxable income.
- The individual, not the College, is responsible for reporting and remitting all related taxes including federal income tax, state income tax, Social Security and Medicare tax.
- These individuals are not covered by the College's workers' compensation plan.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

COMPUTER EQUIPMENT AND SOFTWARE

- Faculty are provided a standard issue desktop or laptop computer domiciled in their College office. Approximately every five (5) years this computer will be replaced by IT. The replacement unit will be paid for by IT. A hardware replacement purchase is not allowed if the five (5) year replacement period has not expired. All replaced and/or disposed equipment must be returned to the College via IT and/or Purchasing where it will be handled following the College's equipment disposal policies.
- The IT department is responsible for the management of all units domiciled in the faculty member's office. This includes purchase, installation, maintenance, and replacement. It is the College's expectation that this computer policy supports all faculty research and scholarship needs. The Faculty is responsible for coordinating equipment maintenance of College equipment domiciled in the faculty member's home office with IT.
- FRA funds can be spent on additional software. As with all expenses, there must be a supportable research activity need for such hardware or software.
- Every three (3) years, Faculty may purchase one "non-standard" issued hardware (e.g. a laptop or tablet computer) from FRAs if it is needed for support scholarship and research. Any hardware purchased using the FRA budget is the property of the College. It will be inventoried by Purchasing. These items should be purchased through IT and Purchasing and should not be made personally by the Faculty member. These items may be domiciled in the Faculty member's home office but should be returned to the College upon separation of employment from the College. Periodically, Purchasing may inquire about this item for purpose of verifying inventory.
- All hardware and software purchased with FRA funds are the property of the College.
- All hardware and software purchases must be requested and ordered through the IT department in order to ensure compatibility with the College's configuration and support capabilities and must comply with the College's purchasing policies.
- Personal reimbursement for any IT related expenses is not allowed. These purchases must be made through Purchasing.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

PRINTERS

Using FRAs for the purchase of office printers is discouraged. Rather, Faculty are encouraged to use the Xerox MFPs and networked printers for their printing needs. Office printers are expensive to maintain, do not promote environmental sustainability, and unnecessarily utilize scarce College resources. Further, they do not provide the equivalent speed and performance as those supported by the College.

All costs related to the purchase and maintenance of non-networked office printers shall be borne by the Faculty's research account.

When an office printer is purchased, the Faculty should contact the Business Center to install and set up this non-networked printer. NOTE: IT is not responsible for the installation, set-up and maintenance of non-networked printers. A recharge for this service will be made against the FRA.

- The paper and toner used in the office printer must be ordered through Faculty Support and will be recharged to the FRAs.
 - Paper for the Xerox MFPs or network printer stations must not be used for office printers. This paper is the property of UCSF. Using the paper for other than the Xerox MFP or the network printers violates the College's agreement with UCSF.
- Maintenance and service calls needed to repair office printers should be made to the Business Center and will be recharged to the FRA. IT is not responsible for printer set up and maintenance. Printers and related supplies for home offices may not be purchased with FRA funds, even if the supplies support scholarship and research.
- FRA funds cannot be used to purchase printers and printer supplies for use outside of the Faculty member's College office.

BOOKS, SUBSCRIPTIONS, AND OTHER RESEARCH MATERIALS

Faculty are encouraged to order books through the Library, assuming that the requested book fits within the collection development policy of the library. This allows the Library to count the books in the College's collection and allows the faculty member to use their books for their research and scholarship pursuits.

- Faculty may use their FRAs to purchase books, subscriptions and other research materials.
- Books and other materials purchased through FRAs are the property of the College.

MEMBERSHIPS

- Certain professional memberships can be funded with FRAs if said membership supports research activity.
- State Bar dues is an allowable expense. For Clinical Faculty, Bar Dues will be fully reimbursed. For all Non-Clinical faculty, 50% of the Bar Dues will be reimbursed. Faculty will pay their Bar Dues, then submit proof of payment to Faculty Support for reimbursement.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

OTHER EQUIPMENT OR GOODS (NON-IT TYPE)

- Purchases of non-IT equipment, goods and services are allowed for FRAs if it is considered supportive of research, teaching, and scholarship activity.
- Such purchases should be made through Purchasing under the College negotiated contracted pricing and through preferred vendors.

PURCHASES FOR USE IN HOME OFFICE

- The College does not support expenses related to having a home office. These expenses include, but are not limited to, desktop computers, printers, paper, and toner. These costs are the faculty member's personal responsibility.
- Any College asset that is authorized for home use must be used for College business only.

SPENDING GUIDELINES FOR FACULTY RESEARCH FUNDS POOL

The Academic Dean's office manages the Faculty Research Pool account. Following are some guidelines for Faculty when requesting funds from the pool.

1. Funding priority will be given for student wages when a Faculty member has exhausted his/her FRA allocation.
2. Funding priority will be given for travel by faculty members who are presenting their scholarly work.
3. Equipment purchases will be approved if funds are available.
4. Early notice of needs, when possible, will make augmentation more likely.

Questions or suggestions should be directed to the Academic Dean's office.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

“HOW TO” GUIDE FOR FRA FUNDS

HOW TO PROPOSE A RESEARCH PROJECT OR TRAVEL FOR ALLOCATION FROM THE POOL

- Submit request in writing to the Academic Dean as soon as funding need is identified.
- Priority given to funding for student research assistants.
- Priority given to for travel where faculty are presenting on their scholarship and research.

HOW TO MONITOR FACULTY RESEARCH ALLOCATION BUDGET AND EXPENSES

- Balances available for spending can be viewed in FIRS (Fiscal Information Reporting System). Contact the Budget Officer in the CFO's office for training or login access.
- Faculty should review the expenses charged to their account at least once per month to ensure accuracy. Errors should be reported to the Controller.

HOW TO HIRE A PERSON

- Contact Human Resources BEFORE the individual is allowed to begin work.
- Contact Purchasing to hire an independent consultant BEFORE the person begin working.

HOW TO GET REIMBURSED FOR TRAVEL EXPENSES

- Submit the Travel Reimbursement form within 30-days of travel and attach all original, itemized receipts supporting travel expenses. http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/travel_reimbuse_interactive.pdf
- Faculty support will prepare an electronic expense report through PayIt! of the amount to be reimbursed.
- The Academic Dean must approve and sign all travel reimbursement forms and expense reports.
- Reimbursement of electronic expense reports will be made within 10 days of receipt of the reimbursement request. Reimbursement of paper expense reports will generally be made within 30-days.
- Reimbursement through direct deposit is mandatory. Faculty can sign up for direct deposit on WebAdvisor.

HOW TO PURCHASE COMPUTER EQUIPMENT AND SOFTWARE

- Contact IT for assistance.

FACULTY RESEARCH ACCOUNTS POLICY & PROCEDURES

HOW TO PURCHASE BOOKS, SUBSCRIPTIONS AND OTHER RESEARCH MATERIALS

- It is preferred that Faculty order books through the Library. These purchases are charged to the Library's budget and not the FRA. The Library's collection development policy will determine whether the purchase is appropriate for the Library. The Librarians strive to be as supportive of faculty scholarship as possible, but budget, space, and personnel constraints have moved the Library more toward the collection-on-demand model of collection development rather than the all-inclusive model pursued in the past. Please consult with the Library's Deputy Director for further assistance.
- For books, subscriptions and other research materials not purchased through the Library, the Faculty member should purchase such items through Faculty Support who will use a PCard.
- Faculty who purchase such items and need to be reimbursed must complete a check request form, attach original itemized receipts and forward to the Academic Dean for approval and processing to Accounts Payable. The check request form can be found at: <http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/Check-request.pdf>

HOW TO REQUEST OFFICE FURNITURE

- Contact the Facilities Department.
- Office furniture and décor expenses cannot be charged to FRAs.

HOW TO PURCHASE MEMBERSHIPS

- If a reimbursement is sought, submit original, itemized receipts to Faculty Support who will create an electronic expense report on behalf of the Faculty member utilizing PayIt! (For Clinical Faculty, Bar Dues will be fully reimbursed. For all Non-Clinical faculty, 50% of the Bar Dues will be reimbursed.)
- The Academic Dean must approve all reimbursement requests

HOW TO ORDER OFFICE SUPPLIES

- Office supplies are generally available through Faculty Support.
- Special orders can be made with Faculty Support.
- Faculty should not purchase office supplies from suppliers other than those approved by the College.

HOW TO PROCESS AN INVOICE FOR DIRECT PAYMENT TO THE VENDOR

- Forward the invoice to Faculty Support (include any documents confirming proof of receipt of goods and services).
- The Academic Dean will approve and sign the invoice and forward it to Accounts Payable for payment.
- If payment is for an individual, an independent consultant agreement must be on file before payment is made. Contact Purchasing for assistance in preparing the Agreement.