

(Central File Classifications)
(Foundation Use Only)

Project Number: _____
(Determined by Foundation)

CALIFORNIA STATE UNIVERSITY, LONG BEACH FOUNDATION AGREEMENT FOR RESEARCH STIMULATION ACCOUNT

This agreement is used to authorize the establishment of Research Stimulation or Fixed Price Residual account.

ACCOUNTS TO BE ESTABLISHED FOR:

(select one box only)

- Project Director (PD)
- Department
- College

PROJECT DIRECTOR'S NAME: _____

PROJECT TITLE: Foundation will determine title based upon items selected.

COLLEGE: _____ **DEPARTMENT:** _____ **Date Project Established:** _____

PROJECT TYPE: Research Stimulation #17-XXXXXX (Indirect Cost Return) Fixed Price Residual #17-XXXXXX (Direct Cost Residual Amounts from Fixed-Price Contracts – "07" Accounts)

PURPOSE OF PROJECT: Promote mission of University and Foundation with emphasis on stimulating research.

ACCOUNT TERMINATION AND DISPOSITION OF FUNDS:	<p>College & Department 17 accounts will always be in the name of the Dean or the Chair and will remain open until University makes a change in Department or College – 17 account balance will follow University changes.</p> <p>17 accounts will remain active until: 1) closed by PD; 2) PD retires or leaves CSULB; or 3) Foundation notes inactivity for more than one year, and confirms with the PD, Dept or College that the account should be closed. If one of these three events occurs, the account balance will transfer to:</p>	<p>Please select one box</p> <p><input type="checkbox"/> College 17 account</p> <p><input type="checkbox"/> Dept. 17 account</p>
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The Project Director (PD) assures that all funds expended on this project will be for the purposes described herein. California State University, Long Beach Foundation, agrees to monitor the expenditures in accordance with the guidelines and procedures for the Research Stimulation and Fixed Price Residual accounts. All property or equipment purchased from this project shall become the property of CSULB Foundation. CSULB Foundation will issue monthly project reports to the PD for reconciliation. The PD should notify CSULB Foundation within two (2) weeks after receipt of these reports if discrepancies exist. If no objections are received, the reports are deemed to be correct. The PD is the authorized signer for this project. The PD is responsible for the signature authority agreement. The PD will be responsible for expenditures made by his/her designated signatories. The PD certifies that expenditures are in compliance with the educational mission of the University, the policies and procedures of CSULB Foundation. The PD agrees to comply with any and all CSULB Foundation policies, procedures and/or directives (as amended from time to time) as they apply to the project covered by this agreement.

Expenditures on this account should be in accordance with the Chancellor's Office Policy on uses of indirect cost. Allowable expenditures include but may not be limited to:

Administrative Costs: Supplies, staff support, grant writers, telephone, printing, utilities, and other operating expenses.	Consultants Dues & Subscriptions Entertainment Fellowships Grant Development	Honorariums Hospitality Instructionally Related Activities Maintenance Payroll & Fringe Benefits	Promotions Public Relations Rent Stipends Travel
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These expenditures may be used to support a cost sharing commitment on a federal grant in accordance with Foundation's cost sharing policy and the appropriate sponsor guidelines.

I have read this agreement and agree to the conditions and terms herein.

Project Director's Signature _____ Date _____

REVIEWED AND APPROVED BY

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|---|------------|----------------------------------|------------|
| 1. Department Chair _____ | Date _____ | 2. Administrative Manager _____ | Date _____ |
| 3. College Dean or Authorized Vice President _____ | Date _____ | 4. Division Vice President _____ | Date _____ |
| 5. Director Grants, Contracts and Fdn Program _____ | Date _____ | | |

COMPLETION PROCEDURES FOR RESEARCH STIMULATION AGREEMENT

Please read the front of this Research Stimulation Agreement (RSA) form before filling it out; especially all the fine print. This is a binding contract between the Project Director (PD) and the California State University, Long Beach Foundation (Foundation). The following procedures will help you to fill out this form completely, with the most useful information, in an efficient manner.

Central File Classification: Determined by the Foundation.

Project Number: Determined by the Foundation. After the RSA has been approved and returned to the Foundation, a number is given to the project. A copy of the RSA with the project number typed on it is returned to the Project Director and the Administrative Services Manager once set-up is completed.

Project Director: The PD is the designated fund operator and must be an employee of the University or the Foundation.

Project Title: The project title is used to further identify the project. *Project title will be determined by type of project, PD name or Dept/College name.*

College: College within CSULB which will receive the benefit of the project.

Department: Department within the College stated above (i.e. Dance is a department within the College of the Arts).

Date Project Established: The date of first anticipated indirect cost or fixed-price residual return.

Type of Project:

Research Stimulation – Funds distributed to account from PD's 07 account when the effective indirect cost rate in 07 account exceeds the minimum costs as referenced in the Foundation Indirect Cost Return Policy (Section 8). Amount of distribution is equal to the effective indirect cost rate times the indirect cost charged to the 07 account. That amount is then distributed between the PD, Dept and/or College in accordance with the agreement on file at the Foundation for the College, Dept and/or PD. The distribution is made in accordance with the Foundation Indirect Cost Return Policy. There is no indirect cost charged on a 17 account.

Fixed Price Residual – Funds will be distributed to account when fixed-price contract in PD's 07 account is closed. The amount transferred to the 17 account will be the direct cost portion of the unspent monies in the fixed-price contract account or the direct cost portion of the loss in the case of an overrun fixed-price contract account. Foundation will charge the indirect cost allowed to the 07 account at the time the fixed-price account is closed. There is no indirect cost charged on a 17 account.

Disposition of Funds Upon termination of project please select how funds shall be distributed, either to the PD's Dept or College 17 account. In the event that the PD transfers, leaves or resigns from the University, the Foundation should be notified immediately so that the transfer to the appropriate account can be made.

Project Director's Signature: The PD must sign and date the RSA before it is sent out for approval. The RSA is a contract between the PD and the Foundation. Please be sure all the information on the form is correct, that all attachments are correct and accounted for and all the information printed on this form is understood. If there is any confusion, call a Foundation Programs Administrator immediately for assistance at (562) 985-5537.

Reviewed and Approved By: The RSA must be approved by: 1) Department Chair; 2) the Administrative Services Manager; 3) College Dean or Authorized Vice President; 4) Division Vice President or President and; 5) Director of Grants, Contracts & Foundation Programs. Once the RSA has been approved, the project is set up in the Foundation's computer system and a copy of the RSA is sent to the PD and the ASM. After the PD has received the completed and approved RSA, he/she can begin using the account.