

**UNIVERSITY OF SOUTH FLORIDA USF
RESEARCH AND INNOVATION
SPONSORED RESEARCH
CONVENIENCE FUND PROCEDURES**

DEFINITION: Non-Project specific funds for salary support of research-related activities at USF

REQUIRED PARAMETERS:

Cash Ahead of Need	Non-Proposal
Non-Project Specific	No Invoicing – No Reporting No
Two Party Contract	Fixed Price Payment
Used for Salary Support	Funded by USF Direct Support Organizations (DSO) and Affiliates

EXAMPLE OF SPONSORS:

USF Foundation, USF Research Foundation, New College Foundation, University Medical Services Association (UMSA), and Hospital Affiliates: All Children's Hospital, Bayfront Medical Center, Shriner's Hospital, Tampa General Hospital, and USF Psychiatry Center

TO SETUP A NEW CONVENIENCE FUND:

1. Create a memo to the attention of Stephanie Rios, Director, Sponsored Research, requesting the establishment of a convenience fund. (Must be submitted to IREA) Include in the memo:
 - a. Purpose of the fund (Please address Research to be performed)
 - b. Which DSO is the funding with?
 - c. Will the fund be self-supporting (if no, what is the source of funding for the new fund)
 - d. Are there restrictions on the new Fund Usage? (If yes, which office is responsible for complying)
 - e. What office will be responsible for budgeting (Are their budgeting constraints)
 - f. In the event the fund runs a deficit, which USF office will be responsible for covering the deficit?
 - g. Name of the Accountable Officer
 - h. Project period (open for one year, after which may be extended)
 - i. Signed off by Department administrator
2. Submit a USF Foundation, Inc. Check Request/Transfer through JIRA
3. Complete the Request to Establish/Update a Chartfield Form
4. Complete a Determining Eligibility Research & Development Activity Conv Fund Form (Found Below)
5. Send the following documents via email to IREA:
 - Signed memorandum requesting set-up of new Convenience Fund
 - Scanned copy of the completed Chartfield for
 - Determining Eligibility Research & Development Activity Conv Fund Form

SUBMIT TO: IREA

Contact: Compliance - E-mail: RFMCompliance@usf.edu

Specific questions Contact: Liz Lauer – ealauer@usf.edu

6. Once Convenience Account has been approved and set up in FAST (you will receive an email from the Controller's office regarding the set up and Fund number), please forward original signed copy of Check Request Form and/or check to the Foundation.

TO REQUEST CHANGES TO A CONVENIENCE FUND:

1. Create a memo to the attention of Stephanie Rios, Director, Sponsored Research, Include in the memo: (Submit to IREA)
 - a. Original Funding Source
 - b. Purpose of the fund (Please address changes made to the purpose of the fund)
 - c. Name of the Accountable Officer
 - d. Project period (open for one year, after which may be extended)

**Questionnaire for Determining Eligible Research and Development Activity
for Convenience Account Funds**

**Name of Convenience Account Fund
Convenience Fund Account Number**

Research and Development is defined by National Science Foundation as creative and systematic work undertaken in order to increase the stock of knowledge — including knowledge of humankind, culture, and society — and to devise new applications of available knowledge. R&D covers three activities— basic research, applied research, and experimental development.

Basic research is experimental or theoretical work undertaken primarily to acquire new knowledge of the underlying foundations of phenomena and observable facts, without any particular application or use in view. Applied research is original investigation undertaken in order to acquire new knowledge ; it is directed primarily towards a specific, practical aim or objective. Experimental development is systematic work, drawing on knowledge gained from research and practical experience and producing additional knowledge, which is directed to producing new products or processes or to improving existing products or processes.

1. **What is the purpose of this convenience account fund?**
 - a. **Are personnel and non-personnel costs posted to this Convenience account fund related to research?**
 - b. **If so, how does this activity constitute or support Research and Development (R&D)?**
2. **What role or job functions do the personnel charged to this Convenience fund perform?**
3. **Do these personnel devote at least .10 FTE per annum or 20 working days a year performing research activities?**

Completed by _____
Title _____
Department _____

Date _____