



April 4, 2024

Scott Apel
Vice President, Administration and Finance
6300 E. State University Drive, Ste 332
Long Beach, California 90815

Dear Mr. Apel,

A copy of the Fringe Benefit (FB) Rate Agreement is being E-mailed to you for your signature. This agreement reflects an understanding reached between your organization and a member of my staff concerning the rate(s) that may be used to support your claim for F&A and fringe benefit costs on grants and contracts with the Federal Government.

In addition, both parties agree to the following differences between the fixed and actual fringe benefit rates:

- For the fiscal year ended June 30, 2022, an under-recovery in the amount of \$12,470 was applicable to Regular Foundation Employees. This amount is included in the fixed fringe benefit rate for the fiscal year ending 2024.
- For the fiscal year ended June 30, 2023, an over-recovery in the amount of \$7,648 was applicable to Regular Foundation Employees. This amount is included in the fixed fringe benefit rate for the fiscal year ending 2025.

Please have the agreement signed by an authorized representative of your organization and send to CAS-SF@psc.hhs.gov. We will reproduce and distribute the Rate Agreement to the appropriate awarding organizations of the Federal Government for their use.

A fringe benefit proposal, together with the required supporting information, must be submitted to this office for each fiscal year in which your organization claims fringe benefit costs under grants and contracts awarded by the Federal Government.

Mr. Apel
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Therefore, your next fringe benefits rate proposal for the fiscal year ending June 30, 2024 will be due in our office by December 31, 2024. Your next F&A rate proposal for the fiscal year ending June 30, 2026 will be due in our office by December 31, 2026. Please submit your next proposals electronically via email to CAS-SF@psc.hhs.gov.

Sincerely,
Darryl W. Mayes -S
for Arif Karim, Director
Cost Allocation Services

Digitally signed by
Darryl W. Mayes -S
Date: 2024.04.05
08:57:07 -04'00'

CONCURRENCE:

California State University – Long Beach Research Foundation
(Institution)


(Signature)

Scott Apel
(Name)

CEO
(Title)

4/11/24
(Date)

Enclosures
PLEASE SIGN AND RETURN A COPY OF THE RATE AGREEMENT

COLLEGES AND UNIVERSITIES RATE AGREEMENT

EIN: 95-6106694
 ORGANIZATION:
 California State University, Long Beach Research
 Foundation
 6300 State University Drive, Suite 332
 Long Beach, CA 90815

Date: 04/04/2024
 FILING REF.: The preceding
 agreement was dated
 04/03/2020

The rates approved in this agreement are for use on grants, contracts and other agreements with the Federal Government, subject to the conditions in Section III.

SECTION I: INDIRECT COST RATES

RATE TYPES:		FIXED	FINAL	PROV. (PROVISIONAL)	PRED. (PREDETERMINED)	
TYPE	EFFECTIVE PERIOD		RATE(%)	LOCATION	APPLICABLE TO	
	FROM	TO				
FINAL	07/01/2021	06/30/2023	47.50	On-Campus	Organized Research	
PRED.	07/01/2023	06/30/2024	47.50	On-Campus	Organized Research	
PRED.	07/01/2024	06/30/2027	50.50	On-Campus	Organized Research	
FINAL	07/01/2021	06/30/2023	50.50	On-Campus	Instruction	
PRED.	07/01/2023	06/30/2024	50.50	On-Campus	Instruction	
PRED.	07/01/2024	06/30/2027	52.00	On-Campus	Instruction	
FINAL	07/01/2021	06/30/2023	47.50	On-Campus	Other Sponsored Activities	
PRED.	07/01/2023	06/30/2024	47.50	On-Campus	Other Sponsored Activities	
PRED.	07/01/2024	06/30/2027	49.00	On-Campus	Other Sponsored Activities	
FINAL	07/01/2021	06/30/2023	26.00	Off-Campus	Organized Research, Instruction & Other Sponsored Activities	
PRED.	07/01/2023	06/30/2027	26.00	Off-Campus	Organized Research, Instruction & Other Sponsored Activities	
PROV.	07/01/2027	Until Amended			Use same rates and conditions as those cited for fiscal year ending June 30, 2027	

*BASE

Modified total direct costs, consisting of all salaries and wages, fringe benefits, materials, supplies, services, travel, and subgrants and subcontracts up to the first \$25,000 of each subgrant or subcontract (regardless of the period covered by the subgrant or subcontract). Modified total direct costs shall exclude equipment, capital expenditures, charges for patient care, student tuition remission, rental costs of off-site facilities, scholarships, and fellowships as well as a portion of each subgrant and subcontract in excess of \$25,000.

SECTION I: FRINGE BENEFIT RATES**

<u>TYPE</u>	<u>FROM</u>	<u>TO</u>	<u>RATE(%)</u>	<u>LOCATION</u>	<u>APPLICABLE TO</u>
FIXED	7/1/2021	6/30/2022	19.20	Foundation	Regular Employees
FIXED	7/1/2022	6/30/2023	18.20	Foundation	Regular Employees
FIXED	7/1/2023	6/30/2024	24.20	Foundation	Regular Employees
FIXED	7/1/2024	6/30/2025	23.70	Foundation	Regular Employees
PROV.	7/1/2025	Until Amended			Use same rates and conditions as those cited for fiscal year ending June 30, 2025

**** DESCRIPTION OF FRINGE BENEFITS RATE BASE:**

Salaries and wages excluding vacation, holiday, sick leave pay and other paid absences.

SECTION II: SPECIAL REMARKS

TREATMENT OF FRINGE BENEFITS:

The fringe benefits are charged using the rate(s) listed in the Fringe Benefits Section of this Agreement. The fringe benefits included in the rate(s) are listed below.

TREATMENT OF PAID ABSENCES:

The costs of vacation, holiday, sick leave pay and other paid absences are included in the organization's fringe benefit rate and are not included in the direct cost of salaries and wages. Claims for direct salaries and wages must exclude those amounts paid or accrued to employees for periods when they are on vacation, holiday, sick leave or are otherwise absent from work.

Fringe Benefits include:

Vacation, OPA (Other Paid Absences), Retiree Medical, VEBA Trust Recovery, Employer Expense for Accrual Payout and Unemployment Insurance.

DEFINITION OF EQUIPMENT:

Equipment means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds \$5,000.

NEXT PROPOSAL DUE DATE

Next fringe benefits rate proposal based on the actual costs for fiscal year ending 06/30/2024 will be due by 12/31/2024. Next F&A rate proposal based on the actual costs for fiscal year ending 06/30/2026 will be due by 12/31/2026.

SECTION III: GENERAL

A. LIMITATIONS:

The rates in this Agreement are subject to any statutory or administrative limitations and apply to a given grant, contract or other agreement only to the extent that funds are available. Acceptance of the rates is subject to the following conditions: (1) Only costs incurred by the organization were included in its facilities and administrative cost pools as finally accepted; such costs are legal obligations of the organization and are allowable under the governing cost principles; (2) The same costs that have been treated as facilities and administrative costs are not claimed as direct costs; (3) Similar types of costs have been accorded consistent accounting treatment; and (4) The information provided by the organization which was used to establish the rates is not later found to be materially incomplete or inaccurate by the Federal Government. In such situations the rate(s) would be subject to renegotiation at the discretion of the Federal Government.

B. ACCOUNTING CHANGES:

This Agreement is based on the accounting system purported by the organization to be in effect during the Agreement period. Changes to the method of accounting for costs which affect the amount of reimbursement resulting from the use of this Agreement require prior approval of the authorized representative of the cognizant agency. Such changes include, but are not limited to, changes in the charging of a particular type of cost from facilities and administrative to direct. Failure to obtain approval may result in cost disallowances.

C. FIXED RATES:

If a fixed rate is in this Agreement, it is based on an estimate of the costs for the period covered by the rate. When the actual costs for this period are determined, an adjustment will be made to a rate of a future year(s) to compensate for the difference between the costs used to establish the fixed rate and actual costs.

D. USE BY OTHER FEDERAL AGENCIES:

The rates in this Agreement were approved in accordance with the authority in Title 2 of the Code of Federal Regulations, Part 200 (2 CFR 200), and should be applied to grants, contracts and other agreements covered by 2 CFR 200, subject to any limitations in A above. The organization may provide copies of the Agreement to other Federal Agencies to give them early notification of the Agreement.

E. OTHER:

If any Federal contract, grant or other agreement is reimbursing facilities and administrative costs by a means other than the approved rate(s) in this Agreement, the organization should (1) credit such costs to the affected programs, and (2) apply the approved rate(s) to the appropriate base to identify the proper amount of facilities and administrative costs allocable to these programs.

BY THE INSTITUTION:

California State University, Long Beach Research Foundation

(INSTITUTION)

(SIGNATURE)

(NAME)

(TITLE)

(DATE)

ON BEHALF OF THE GOVERNMENT:

DEPARTMENT OF HEALTH AND HUMAN SERVICES

(AGENCY)

Darryl W. Mayes -S

(SIGNATURE)

for Arif Karim

(NAME)

Director, Cost Allocation Services

(TITLE)

04/04/2024

(DATE)

HHS REPRESENTATIVE: Lucy Siow

TELEPHONE:

(415) 437-7820

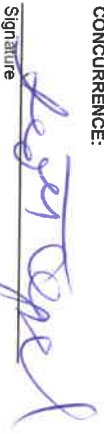
COMPONENTS OF THE PUBLISHED F&A RATES

INSTITUTION California State University - Long Beach Research Foundation

FY COVERED BY RATES 07/01/2022-06/30/2027

	ORGANIZED RESEARCH FY2022-2024		ORGANIZED RESEARCH FY2025-2027		INSTRUCTION FY2022-2024		INSTRUCTION FY2025-2027		OTHER SPONSORED ACTIVITIES FY2022-FY2024		OTHER SPONSORED ACTIVITIES FY2025-FY2027	
	On-Campus	Off-Campus	On-Campus	Off-Campus	On-Campus	Off-Campus	On-Campus	Off-Campus	On-Campus	Off-Campus	On-Campus	Off-Campus
Bldg & Improv - Depr/Use Allow	5.9		4.6		6.0		5.3		5.9		4.5	
Equipment - Depr/Use Allow	0.8		1.5		0.8		1.2		0.8		1.1	
Interest	0.8		1.8		0.7		1.5		0.6		1.2	
Operations & Maintenance	13.1		15.5		14.0		14.5		12.7		15.0	
Library	0.9		1.1		3.0		3.5		1.5		1.2	
Utility Cost Allowance												
Administrative Component	26.0	26.0	26.0	26.0	26.0	26.0	26.0	26.0	26.0	26.0	26.0	26.0
Total	47.5	26.0	50.5	26.0	50.5	26.0	52.0	26.0	47.5	26.0	49.0	26.0

CONCURRENCE:

Signature 

Name Scott Appel

Title CEO

Date 4/11/24