

UFarm Standard Operating Procedures and User Guide

Date: March 2024



UFARM

1.1 What is UFarm?

UFarm is a University of Florida approved Fee-for-Service Educational Activity ([FSEA](#)) intended to recover costs related to crop, tree, and other plant growth and maintenance at UF/IFAS Research and Education Centers (RECs) and Sites in addition to centralized controlled growth environments on campus. FSEAs at the University were formerly known as an Educational Business Activity (EBAs). Approved FSEA rates provide a standardized break-even, cost-based pricing mechanism for faculty to budget and charge UF/IFAS incurred costs related to crop, plant, or tree growth and maintenance to grants and other funding sources.

UFarm is managed through an online web-based system – built and maintained in Hyland’s OnBase platform by the University of Florida’s Information Technology group (UFIT). This web-based system is hosted on the UF/IFAS Dean for Research website (Link: [UFarm](#)).

Research studies are entered into UFarm by faculty through a form available on the website and study progress at the various UF/IFAS RECs and Sites is managed through the UFarm online platform.

Purpose and Objectives of UFarm:

- **Provide Cost-based Pricing for Faculty, RECs, and Sites** – UFarm pricing on a commodity/service line basis has been established using cost information derived from myUFL via Peoplesoft with the goal of providing faculty with data-supported rates. Doing so assists the RECs and Sites with having the cash resources necessary to cover both upfront and continuing costs associated with hosting faculty and staff-led research. This dedicated UFarm account (known as Fund 183) should allow the RECs and Sites to have more available funding (i.e., outside of Fund 183) for REC and Site maintenance, improvements, new mission efforts, etc.
- **Ensure Compliance with Federal Regulations** (2 CFR 200 §200.468) – Approved rates are needed to appropriately charge plant, crop, grove, and other commodity-specific research costs to federal awards. RECs and Sites charging crop, plant, or grove expenses on unapproved rates are vulnerable to federal auditor scrutiny for such costs.
- **Provide Administrative Relief** – Creating a uniform study request form using local workflow approval gives RECs, Sites, and faculty/staff across the Institute a consistent and unambiguous process to initiating, servicing, and completing field-level or controlled growth research studies.

- **Generate Usage and Research Impact Information** – The UFarm system collects data on the usage and type of commodities being grown across the RECs, sites and centralized controlled environments. Such information can assist UF/IFAS leadership and others like academic department chairs, center directors, and others with better understanding the collective impact for the Institute’s field and grove research.

1.2 UFarm Commodities

The commodities with approved rates included in UFarm are available on the Office of the Dean for Research website (Link: <https://research.ifas.ufl.edu/ufarm/>). Note that these approved commodity rates have been combined into service lines – doing so simplifies rate determination without adversely affecting costs associated with a specific commodity.

1.3 UFarm Help and Resources

This standard operating procedure document is intended to cover most topics UFarm users will encounter. However, it is important for faculty and staff at RECs and Sites using this platform to understand the resources available should they need assistance. The UFarm team based in the UF/IFAS Office of the Dean for Research is always available at UFarmhelp@ifas.ufl.edu. Additionally, the UFIT OnBase team is available at DocumentManagement@ad.ufl.edu for any technical questions or difficulties with the online UFarm platform. Finally, UFarm has an advisory committee consisting of faculty and staff users, academic department chairs, and center directors (see Appendix I). This committee assists UF/IFAS leadership and the UFarm team with key strategic decisions and can be a resource and sounding board as efforts continue to improve the system. Any questions or comments about key strategies or issues related to UFarm can be communicated to any member of the UFarm Advisory Committee.

2.1 REC and Site Responsibilities

Key farm and fiscal staff at RECs and Sites are responsible for the management of research studies submitted to their location. All expenses related to facilitating UFarm studies should be properly assigned and coded in Peoplesoft. Studies in the UFarm system should be properly managed and assigned to the relevant queue according to study progress in the OnBase platform. Each REC or Site should monitor actual farm usage (e.g., acreage, inputs) to studies entered in UFarm to ensure the system accurately reflects what is occurring at the location. All RECs and Sites should create and maintain documentation on what is considered *usual and customary* in terms of farming practices for their location (e.g., available equipment, row spacing, etc.). Such information should be readily available for any existing or potential faculty, staff, or student user at that location.

Additional detail on how to use the UFarm system and certain responsibilities related to UFarm is provided in Subsections 2.2-2.5.

2.2 REC/Site-provided Services (*Usual and Customary*)

UFarm is a UF-approved system with the overarching goal of providing cost recovery for the RECs, Sites, and other locations while maintaining compliance with federal regulations. Within reason, UFarm allows RECs and Sites to define what is *usual and customary* in terms of growing practices for their particular location. There are several factors that go into how specific commodities are grown at various locations

(e.g., equipment limitations, commercial practices in the area) so it is important that such locations across the state detail such practices and offerings – doing so will allow for a more accurate capturing of costs.

- RECs and Sites will be responsible for providing the following:
 - Standard row, bed, or other spacing for specific commodities
 - Plot, tree, or other spatial (e.g., linear foot of row) unit of measure with a conversion to an acre for study accounting purposes

2.3 Studies to be Entered in UFarm

It is important that field areas used for purposes described below are correctly entered in UFarm – doing so will lead to better consistency and ensure that sponsors are not disadvantaged through inaccurate UFarm rates and/or variable field-level operations.

Generally speaking, any study for the purposes of basic or applied research or that is externally funded should be entered into UFarm. This includes studies that are not funded from an external agency or source. Unfunded studies can and should be paid through other sources including faculty start-up funds, IDC, residuals, royalties, and/or appropriate REC and Site funds.

Studies that should be entered into UFarm include:

- Studies for basic or applied research (funded or unfunded).
- Trials for commercial entities or other beneficiaries (including Faculty Service Program efforts).
- Any other internal or external- funded activity.

Items that should not be entered into UFarm include:

- Bulk horticultural or agricultural production not under an active UFarm study. (Bulk agriculture production that is also being used for research purposes should be discussed with the UFarm team).
- Regular maintenance of land and/or crops that is not under active study but may be used in the future (known as “research ready”).
- Areas for teaching, demonstration, or field day activities that are not being researched (e.g., non-replicated and more general commodity production).

2.4 UFarm Study Areas

UFarm studies should be mapped by staff at RECs and Sites to confirm proposed acreage submitted online by faculty. Areas that must be managed similar to the focus of the study should be included in the acreage determination for UFarm.

Note that the perception of *the smaller the area, the less the study will cost* is not necessarily true. Often input costs will stay the same, so artificially creating a small area could lead to higher rates with more cost inputs used over a smaller area.

2.4.1 Borders and Alleys

Borders and alleys should be included in UFarm study acreage calculations as general production practices include treatments and efforts that cover such areas. These areas within and around actual studies should be defined by each REC and Site and clearly communicated to faculty, staff, and student users.

2.4.2 Fallow Land

Fallow areas inside a UFarm study should be excluded from the UFarm acreage measurement. RECs and Sites generally incur minimal costs in the maintenance of true fallow areas. Including them in the study acreage calculation can disproportionately increase the cost to the faculty and ultimately the sponsor.

2.4.3 Buffer Zones

Buffer Zones should not be included in the UFarm study acreage. An example of a buffer zone would be bulk commodity production between two research areas that are part of the same study.

2.5 Defining Study Periods in UFarm

2.5.1 Study Start

Studies should be started in UFarm as soon as the staff commences with land preparation or other initial efforts for the study. Items and specific inputs may have been pre-purchased as either part of a bulk purchase or in preparation for the upcoming study. However, the UFarm team will not begin billing until the study has been started by farm level or other staff at RECs and Sites. Faculty are encouraged to communicate with the staff at RECs and Sites on the study start date for all UFarm projects. Details on how to use the UFarm system are provided in Section 4.

2.5.2 Study End

The study should be formally ended when staff at RECs and Sites determines that no more cost inputs or effort will be needed for the study. Faculty, staff, and students are encouraged to communicate with the staff at RECs and Sites on the study end date for all UFarm projects. It should be noted that the UFarm-related end date may differ from the date that the faculty/staff member releases their study acreage back to the REC or Site.

2.5.3 Unsuccessful UFarm Studies

Studies entered in UFarm may lead to no or unsuccessful data – due to issues like human error, adverse weather-related impact, etc. The REC or Site where such a study was impacted will most likely have incurred costs in the establishment and limited production of the commodity under research. Thus, there is an expectation that the faculty lead for an unsuccessful study will pay regardless of the study outcome. However, if staff at a REC or Site have negatively impacted a study or adverse weather events (e.g., hurricane) or human error by farm staff renders a study unusable, affected faculty are encouraged to reach out to the appropriate REC and Site leadership and, if needed, agricultural experiment station and UFarm staff – the outcome of such situations will be determined on a case-by-case basis.

3.1 Services and Expenses Included in UFarm Rate

3.1.1 Expenses included in UFarm Rates

Approved UFarm rates currently only include direct expenses related to commodity growth and maintenance. Currently, labor is not included in the calculated UFarm rates. Any labor effort provided in support of UFarm study activity is considered part of an overall subsidy and is not included in any approved rates. There is the possibility that some portion of labor needed for each commodity researched could be included in the future and this is why the UFarm team is currently requesting labor effort reporting for commodity-specific research. The issue of including labor is currently being discussed with UF/IFAS leadership with input from UF Finance and Accounting. Across the REC and Site system, there is no standard practice of services provided by onsite staff – such availability and level of service is and should be determined by the individual REC or Site.

Generally speaking, direct cost inputs that are considered *usual and customary* to crop, plant, or tree growth and maintenance should be expensed in Fund 183 using appropriate Flex Codes. Engage directly with UFarm fiscal staff or any UFarm team member for additional details about Fund 183 and Flex Codes.

The phrase *usual and customary* for commodity-specific research is used with the understanding that such efforts and practices at the field and grove level will vary based on the commodity and, in some cases, the REC or Site location. Any questions about whether an expense can or should be included should be discussed with the UFarm team.

Below is a general guideline of direct expenses that **may be applied** related to UFarm operations (Note: this list is not comprehensive):

- Agricultural Supplies
 - Pesticides
 - Herbicides
 - Fungicides
 - Insecticides
 - Fumigants
 - Fertilizers
 - Drip tape
 - Mulch
 - Irrigation supplies
 - Minor Tools
- Repair and Maintenance
 - General repairs to equipment used in UFarm under \$5,000 (should be allocated proportionally if also used outside UFarm-related research)
- Motor Fuels and Lubricants
 - Gasoline and diesel used to operate farm equipment
 - Lubricants for farm-related equipment
- Other/ Miscellaneous
 - Small hand tools
 - Contracted services
 - Soil Samples/preparation
 - Leases related to equipment used for UFarm-related research

3.1.2 Expenses Not Applied to UFarm.

The below expenses are generally not allowable to UFarm in Fund 183. Please contact the UFarm team for any questions on allowable/unallowable items.

- Capital repairs or purchases above \$5,000 (Note: larger repair items related to just one or a few commodities should be discussed with UFarm team)
- Lab supplies, equipment, or services (considered research)
- Utilities (e.g., electricity, water)
- Building maintenance or supplies
- Travel (in or out of state)
- Meetings
- Subscriptions
- Health assessments
- Computer equipment or supplies
- Office supplies
- Uniforms
- Depreciation
- Labor

3.1.3 Unusual Costs and/or Items Related to Research Specifications

As an approved cost-recovery system, UFarm is intended to cover the costs of *usual and customary* inputs and efforts for commodity-specific research at the RECs and Sites. Faculty may request specific items related to their research protocols or preferences. REC and Site staff should determine the materiality and uniqueness of any such specific requests in assessing whether the item can be applied to UFarm or if it should be a direct charge to the faculty funding source. Items costing significantly more than customary items or inputs should generally be applied directly to the faculty funding source(s). Please contact the UFarm team for any assistance in determining how to handle these types of specific requests or issues.

3.1.4 Seed, Plant, Tree, and other Genetic Material Procurement

Due to the complexity of how seed, plants, trees, and other genetic materials are acquired across the REC and Site system, costs related to direct research inputs should not be included in the UFarm system at this time. Such costs should be a separate cost item in any budget proposal for a sponsor. However, seed procurements for cover crops, either to prevent erosion or provide a research-ready option on plots used for UFarm research studies, may be included on Fund 183. Any additional costs to manage cover crop growth and development for preventing erosion or research readiness are not allowed.

3.1.5 In-Kind Donations

In-kind donations for research efforts does benefit all of UF/IFAS and specifically RECs and Sites that utilize them, but such donated inputs can lower the overall rate for commodities that benefit from them. However, UF Finance and Accounting has determined that in-kind donations cannot be accounted for in the UFarm system. In other words, in-kind donations cannot reduce the rate for a specific commodity, study, or particular REC or Site. In-kind gifts or donations, though, should be properly

documented and recorded with UF/IFAS Advancement. For additional information, contact the UF/IFAS Advancement Office (Link: <https://give.ifas.ufl.edu/gift-in-kind/>).

3.2.1 UFarm Services

Field-level services provided by each REC or Site are determined based on their normal or available operating procedures. Faculty should understand that UFarm rates do not provide any cost recovery for labor – RECs and Sites typically will not be able to provide any additional services when a UFarm rate is being utilized for a study. Faculty should discuss with REC and Site field-level staff and/or Center Directors to better understand what labor services can be provided.

In summary, there is no standard for services as part of the UFarm system. REC and Site staff are only expected to expense direct cost inputs related to the *usual and customary* practices for commodity crop growth and maintenance in research studies.

4.1 Accessing UFarm – Using the UFarm tool

UFarm Link for Faculty & Staff Users: <https://research.ifas.ufl.edu/ufarm/>

Note: Helpful information about how to navigate once online will be provided via PDF soon.



5.1 UFarm Billing Cycle

UFarm billing begins once the study site marks the UFarm study as “started” and continues typically until one month after the study is marked as “completed”. Commodity rates are per growth cycle or up to a maximum of 12 months for perennials. The commodity rate will stay the same, however, monthly charges may vary depending on the duration of the study. See the next section on UFarm Monthly Billing Rates for additional details and examples. Billing is always done one month in arrears. For example, June service will be billed and collected in July.

It is well understood that research with several commodities typically incur the majority of expenses prior to or during the start of a study with them. Billing occurs after a study has started and at equal amounts each month. This is a UF Finance and Accounting requirement and, in the case of UFarm, is done to accommodate perennials and to take a more conservative approach to eliminate any concern that a REC or Site has not incurred the costs that are being billed. It is possible that the delayed billing cycle may cause a low cash balance for Fund 183 at certain RECs and Sites. If a location has concerns regarding their cash balance, they should communicate those concerns with the UFarm team.

5.2 UFarm Billing Structure:

For those service lines that incur more than 50% of the total study cost up front (pre and at planting preparations), UFarm charges will have 50% of total study cost charged on the first invoice, the

remaining 50% will be distributed evenly over the duration of the study. For service lines that do not incur large upfront cost, they will have the study total cost evenly distributed over the duration of the study. Please see list below for the billing structure for each service line.

- Billing structure to be used:
 - A. 50% study total cost on first invoice, remaining 50% spread evenly over the duration of the study.
 - B. Total study cost spread evenly over the duration of the study.

Service Line	Flex Code	Billing Structure
Alternative Energy Crops	FRMALT01	A
Aquatic Plants	FRMAQUP01	A
Avocado	FRMSTON22F	B
Banana	FRMTROP33B	B
Berries	FRMBRRY02	B
Carambola	FRMTROP33C	B
Citrus	FRMCIT03	B
Coconut	FRMSTON22E	B
Cole Crops	FRMCOL04	A
Corn - Field/Low Input	FRMCRNL06	A
Corn - Sweet/High input	FRMCRNH05	A
Cotton	FRMCOTTN07	A
Cover Crops	FRMCOV08	A
Cucurbits	FRMCUCU09	A
Forages	FRMFOR10	A
Grapes	FRMGRAP11	B
Guava	FRMTROP33D	B
Hops	FRMHOPS31	B
Hemp - CBD	FRMHEMP30A	A
Hemp - Grain/Fiber	FRMHEMP30B	A
Leaf Vegetables	FRMLFVG13	A
Legumes	FRMLEGU28	A
Mango	FRMSTON22D	B
Non-Fruit Bearing Trees	FRMNFBT15	B

Ornamentals	FRMORN16	B
Other Vegetables	FRMOVG14	A
Papaya	FRMTROP33F	B
Passion Fruit	FRMTROP33E	B
Peanuts	FRMPNUT17	A
Peppers	FRMPEPP18	A
Pitaya	FRMTROP33H	B
Potatoes	FRMPOTA19	A
Rice	FRMRICE32	A
Shrubs	FRMSHUB20	B
Soapberries	FRMSOAP34	B
Sorghum	FRMSORG21	A
Stone Fruit	FRMSTON22	B
Strawberries	FRMSTRW23	A
Sugar Beet	FRMOVG14L	A
Sugarcane	FRMSUGA29	A
Tomatoes	FRMTOM24	A
Tropical Fruit	FRMTROP33	B
Turf - High	FRMTURFH27	B
Turf - Medium	FRMTURFM26	B
Turf - Low	FRMTURFL25	B

5.2.1 Monthly Billing Rate Example (50% Charged on First Invoice):

Faculty #1 wants to study one acre of tomatoes for three months, while Faculty #2 will conduct a one-acre tomato study over four months.

UFarm Tomato Rate: \$5,800/acre

Total Cost for Faculty #1: = \$5,800 x 1 acre = **\$5,800**

Total Cost for Faculty #2: = \$5,800 x 1 acre = **\$5,800**

Total Monthly Rate for Faculty #1: = \$5,800/3 months = **\$2,900/First Month, \$1,450/Month 2 and 3**

Total Monthly Rate for Faculty #2: = \$5,800/4 months = **\$2,900/First Month, \$966.67/Month 2, 3, and 4**

This example shows how both faculty members will be charged the same amount; however, the monthly rates after the first month will be different.

5.2.2 Monthly Billing Rate Example (Evenly Distributed): Faculty #1 wants to study one acre of Citrus for ten months, while Faculty #2 will conduct a one-acre Citrus study over twelve months.

UFarm Citrus Rate: \$1,249/acre

Total Cost for Faculty #1: = \$1,249 x 1 acre = **\$1,249**

Total Cost for Faculty #2: = \$1,249 x 1 acre = **\$1,249**

Total Monthly Rate for Faculty #1: = \$1,249/10 months = **\$124.90/Month**

Total Monthly Rate for Faculty #2: = \$1,249/12 months = **\$104.08/Month**

This example shows how both faculty members will be charged the same amount; however, the monthly rates will be different.

5.3 Prorated Rates

Approved UFarm rates are not monthly charges, therefore, they will not be prorated based on the length of the study. The logic for this is that the REC or Site must grow and maintain the commodity in order to have it available for the study being conducted. Thus, the REC or Site incurred the total cost of the commodity growth cycle in order to have it ready for use and should recover the entire amount.

5.4 Unique UFarm Billing Scenarios

5.4.1 Two Faculty Members using the same area.

If two faculty members are studying the same commodity in the same space during the same time, the charges should be allocated proportionally to each faculty member (50/50 split).

5.4.2 Relay Cropping

Relay cropping for this purpose is defined as instances where crops are planted right after each other, typically on beds with materials that already exist (e.g., plastic mulch, drip irrigation, etc.). UFarm has not established rates for this practice. At present, the second crop planting would be charged at the same rate as the initial planting. The costs of each planting will be averaged along with other instances of the crop in UFarm across UF/IFAS.

5.4.3 Intercropping

Intercropping is defined as planting two or more commodities in the same area. The overall study should be allocated proportionally between the crop types and the area covered.

6.1 Rate Development for New or Emerging Commodities

If a commodity is not listed on the UFarm website, the UFarm team should be contacted to determine how best to proceed. The general guidance for evaluating how to proceed with a new commodity is provided below.

Step 1:

Determine if the commodity will use significant acreage, be studied across multiple RECs or Sites, or be studied over multiple years. If it is not, the recommendation will be to direct charge the funding source for the costs of growing the commodity. It is also possible that a very similar commodity could be used for the rates.

Step 2:

Provided the answer to step one was “yes,” the next step is to determine if there is a similar commodity. If there is, a provisional rate using the existing commodity will be proposed to the Controller’s office. If not, the UFarm team will have to discuss the budgeted inputs for the commodities to create a formal rate submission for the UF Controller’s office. In some instances, expenses will have to be tracked over one growth cycle before a rate can be submitted.

Step 3:

Create the commodity in UFarm. The UFarm team will have the new service line and commodity created so faculty can request it through UFarm. Until a rate is established, the commodity will be listed at \$0. However, faculty should consult with the UFarm team and site to determine an appropriate amount to budget for future UFarm costs.

Step 4:

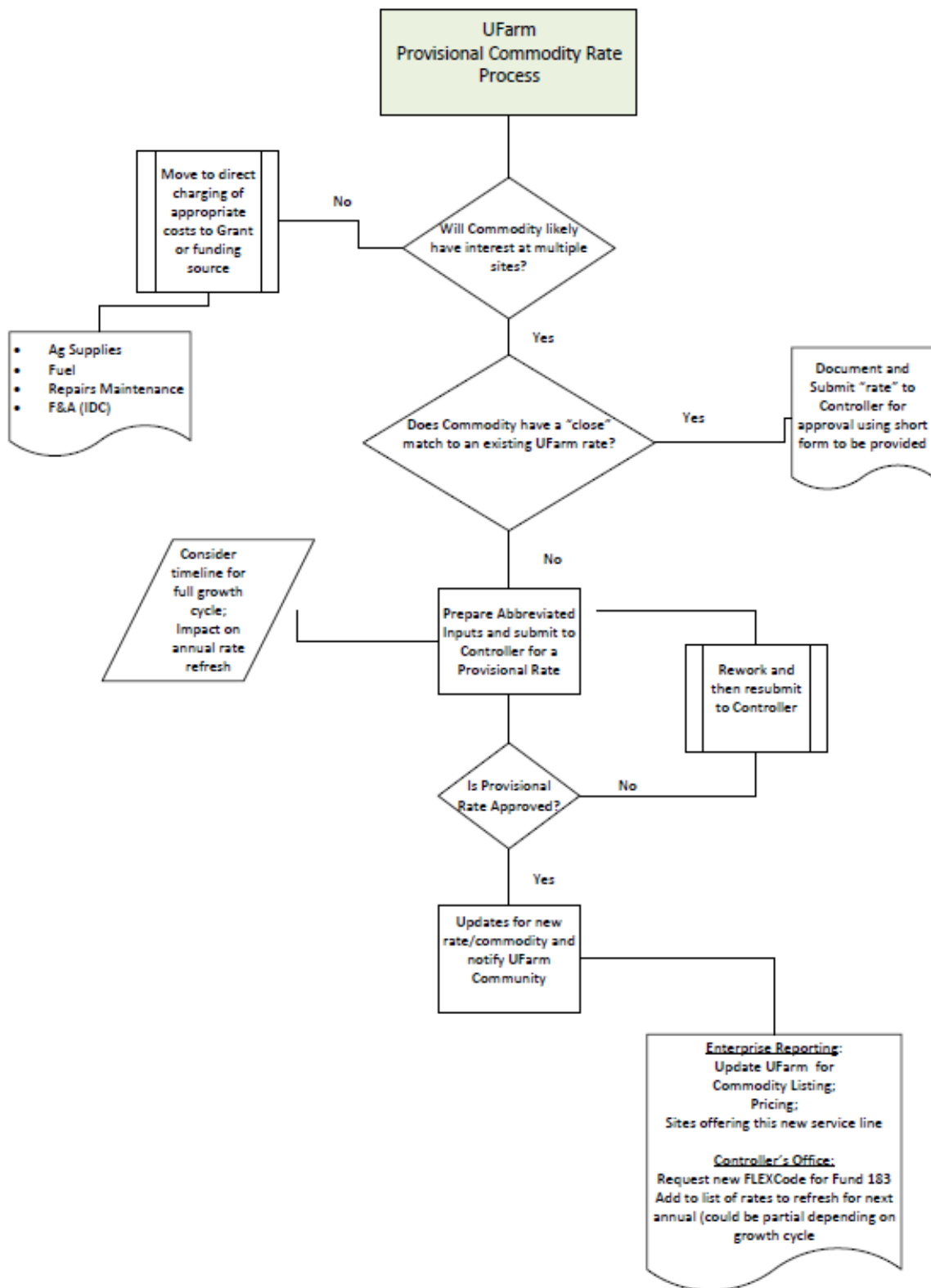
Determine the need for additional Flex Codes. If the commodity will not be direct charged or rolled into a similar service line, the UFarm team will create a Flex Code to track expenses related to the commodity. This will happen for both the provisional and formal rate submission process.

Step 5:

Apply any costs related to the new study to the Flex Code. Any expenses related to the commodity should be applied using the newly created Flex Code. This will assist with future rate refinement.

The UFarm rate approval process can take months, which can delay or prevent a REC or Site from recovering costs associated with supporting the research of a new commodity. REC and Site staff should work with the UFarm team as soon as they are aware a new commodity is planned.

A provisional rate process has also been established to help with the time it takes for new rates to be created and approved by UF Finance and Accounting. An outline of the decision process for new commodities is provided below.



Appendix I

UFarm Advisory Committee

Updated: March 2024

Center Directors

Mike Burton, Southwest REC
Gilly Evans, Tropical REC

Academic Department Chairs

Wagner Vendrame, Environmental Horticulture
Chris Gunter, Horticultural Sciences
Mathews Paret, Plant Pathology

Campus & REC Faculty/Staff Users

Jude Grosser, Horticultural Sciences, Citrus REC
Carlene Chase, Horticultural Sciences, Campus
Jim Boyer, Plant Sciences Research and Education Unit
Silvana Paula-Moraes, Entomology & Nematology, West Florida REC
Calvin Otero, Agronomy, Everglades REC
Xin Zhao, Horticultural Sciences, Campus
Nathan Boyd, Horticultural Sciences, Gulf Coast REC