

From: [UCSF OSR Announcements](#) on behalf of [OSRinfo](#)
To: OSRANNOUNCE@LISTSRV.UCSF.EDU
Subject: OSR Funding Model Subcommittee FY17 Recommendations
Date: Thursday, March 03, 2016 12:48:43 PM

****This message is from the Office of Sponsored Research and the OSR Advisory Board****

Dear Colleagues,

We are pleased to share the recommendations of the Office of Sponsored Research (OSR) Funding Model Subcommittee for FY17. The subcommittee was formed by the OSR Advisory Board last year with two primary goals: 1) to evaluate the funding model structure and recommend an alternative if appropriate, and 2) to promote stakeholder engagement and transparency regarding the OSR budget and funding model decision-making and rate-setting. Throughout the process, the subcommittee gathered feedback from faculty and department administrators and also consulted with the OSR Advisory Board.

The subcommittee has recommended changing the OSR cost allocation methodology to a PI count-based model in which departments pay a fixed annual fee per PI for OSR services beginning in FY17. The subcommittee reached this recommendation after evaluating several alternatives, including the current model, against a set of criteria established to promote efficiency, transparency, simplicity, and fairness. Under the PI Count model, *a PI is defined as anyone except a graduate student who submitted a proposal of any type, excluding a JPA, via eProposal between December 1, 2014 and November 30, 2015.* Details of how the definition of a PI was derived, along with more details about the subcommittee's process and recommendations, are provided in the [OSR Funding Model Subcommittee FY17 Recommendations slidedeck](#) on the [OSR website](#).

The subcommittee also reviewed OSR's FY17 budget and recommended rates based on 3% budget growth, to be achieved by reducing amortization payments and extending the amortization period. Furthermore, the subcommittee recognizes affordability as a major concern for departments and expects that future years' growth will limit the per PI cost to inflationary increase (~3% annually). The subcommittee will annually review budget and make rate recommendations, including evaluating the effectiveness of the allocation model.

The Advisory Board endorsed the subcommittee's recommendations, which were then forwarded to and approved by Brian. The preliminary per PI rate for FY17 is ~\$8,000 per PI, but this number will change once departments review and validate their PI rosters in the coming weeks. We expect the final per PI rate will be confirmed in March. Please watch for communication from the OSR business office regarding validation of your department's PI count.

We are grateful to the subcommittee members for their thoughtful participation and outreach efforts to develop a new allocation methodology and improve the transparency of OSR's rate-setting process. We welcome questions and also urge you to contact members of the subcommittee with specific questions.

Regards,

Brian Smith
Associate Vice Chancellor, Research Infrastructure and Operations

Clarice Estrada
OSR Advisory Board Chair

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