

OSP NEWSLETTER

FELLOWSHIPS

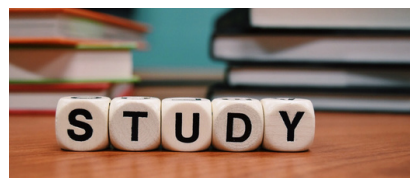
DUCK, DUCK, FELLOWSHIP MARCH 9, 2022

Each year there are fellowship opportunities available from a variety of sponsors. Our talented students, with help from their advisors, are applying for and receiving these prestigious awards. Fellowships and their recipients are unique, and institutions treat them differently in pre- and post-award. So, a bit like the childhood game of duck, duck, goose – when you are ‘tapped in’ for a fellowship proposal or award, it may surprise you and have you running around in circles.

One of the major differences between a fellowship and other sponsored research is the proposal, budget, and award are solely for the benefit of the student. When awarded and work starts on the project, the student becomes a fellow. For some students, such as graduate students, their employment type might change from employee to fellow. Fellowship recipients are not salaried employees. Instead, they are trainees of the fellowship and receive a stipend. While Graduate Assistants may be offered salary and tuition in accordance with guidance from the graduate school, fellowships trainees may be paid a stipend, tuition, and student fees. Unlike other sponsored projects, the budget for a fellowship can include student fees, and they should be allowed if the project is awarded.

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BLOG RE-CAP



It's Fellowship season! There have been numerous blogs written over the past couple of years regarding the nuances of fellowships. This newsletter provides a re-cap and a reminder that fellowships differ from research awards and from each other. Reach out to OSP for assistance:

The Training Team:

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CHECK THIS OUT!

**QUICK CLIP - ASSISTANTSHIP
SALARY VS FELLOWSHIP
STIPEND**

ASSISTANTSHIP VS. FELLOWSHIP JULY 15, 2021

Assistantships provide salaries for specific work to be conducted. At CSU, Graduate Research Assistants (GRAs) are often funded by a grant, cooperative agreement, or contract whereas Graduate Teaching Assistants (GTAs) and Graduate Service Assistants (GSAs) are typically funded by the Institution. Students on assistantships are employees of CSU and their work is tied to their discipline or a particular line of research. Work on an assistantship primarily benefits the project and/or the Institution.

GRAs on sponsored projects should be budgeted under ‘Personnel’ and an appropriate fringe benefit rate should be included. Remission of base tuition is considered a fringe benefit, though it does not cover a college’s Graduate Differential Tuition. Some colleges, such as Engineering, Business, and Natural Sciences, as well as inter-disciplinary programs such as the School of Advanced Materials Discover (SAMD), Graduate Degree Program in Ecology (GDPE), and Cell and Molecular Biology, provide Differential Tuition for all graduate assistants. For these units, differential tuition may be budgeted (and charged) on a sponsored project.

General fees such as technology charges, transportation fees, and special course fees are not provided to graduate assistants and should not be budgeted on or charged to a sponsored project.

A contribution to health insurance is provided by the Graduate School during fall and spring semesters for graduate assistants who meet all of the following criteria:

- Appointed to a 25% (10 hours per week) or more assistantship (GTA, GRA, GSA, GRAPreDoc Fellowship) by the end of the regular add/drop period in either fall or spring semester or both
- Enrolled in CSU's Student Health Insurance Plan (SHIP), not applicable to any other insurance plan
- Enrolled in 5 or more resident-instruction credits (Audits, Continuous Registration, and CSU Online Credits* do not meet the Resident Instruction enrollment criteria for this policy)

Fellowships provide financial support for an individual's pursuit of learning, whether in the classroom or in tandem with a project. Unlike GRAs, Fellows are not considered CSU employees and are compensated via stipends rather than wages. Depending on the fellowship terms and conditions, fellowships may include additional funds to pay for textbooks, housing, tuition (including out-of-state, international, and differential tuition), travel, insurance, or other costs related to education and/or training in a particular area.

Fellowships may or may not include a service component; may go directly to an individual or through the Institution, and may or may not have deliverables. Training on a fellowship primarily benefits the Fellow.

Funds for Fellows should be budgeted according to sponsor guidance. Stipend levels, institutional allowances, and training-related expenses are set by the sponsor. Consult the award terms and conditions for allowability.



FELLOWSHIPS, SCHOLARSHIPS, AND ASSISTANTSHIPS - OH MY!

APRIL 18, 2018

Expert from blog...

The following table shows a comparison between fellowships, assistantships, and participant support, along with hourly student employees, in terms of institutional classification; if paid through a stipend or wages; reporting of income; and the applicable CSU office to contact with questions.

	Fellowship	Assistantship	Participant Support	Hourly Student Employee
University employee?	NO	YES	NO	YES
Paid as	STIPEND	WAGES	STIPEND/FEE	WAGES
Income reporting	1098T	W9	1099	W9
CSU office	Student Financial Services	Human Resources/Payroll	Business & Financial Services/Accounts Payable	Student Employment Services

When in doubt on how to classify or pay a student, please contact the appropriate unit as listed above.

Continued from page 1...

Some fellowships, like the NSF Graduate Research Fellowship Program (GRFP), go beyond allowing fees to be paid. These programs stipulate that the fellowship or institution must pay the fees, they cannot be an out-of-pocket expense for the trainee.

A unique characteristic of a fellowship is the expectation that the trainee will independently complete the work and submit any required reporting. While the advisor may be the PI of record, the sponsor does not expect them to have effort on a fellowship. Their institutional appointment already captures their effort as advisor so CSU's effort policy of capturing 1% minimum effort as cost share for PIs generally does not apply to fellowships.

Sometimes fellowships have requirements that are contrary to federal or sponsor guidance; for instance, the NIH NRSA Fellowship. This fellowship encourages the trainee to request, and spend if awarded, \$2,500 in childcare costs each budget period. Since it is a requirement to allow it in the proposed budget and subsequent award, the institution must make an exception. NOTE: This exception does not mean that childcare costs are an allowable cost on other awards*.

The examples above are just a couple of the differences fellowships might have from other sponsored awards. Every fellowship is different. PIs along with their research administrators should conduct a thorough review of the solicitation and award and communicate any unique requirements to their OSP Team. This will allow everyone to be on the same page and allow you to stop running in circles – GOOSE!

*Both Uniform Guidance and several sponsors have made changes to allow childcare in some instances of extended travel for the benefit of an award if the institution has a policy in place. Currently, CSU does not have a policy in place.

RESOURCES

- [CSU Graduate School](#)
- [NSF GRFP](#)
- [NIH NRSA guidelines](#)
- [NIH Extramural Nexus](#)
- [Assistantship Benefits, Resources, and Policies - An overview for Graduate Assistants](#)
- [Kuali Research Activity Type Definitions](#)

ACTIVITY TYPE IN KRPD: RESEARCH VS. FELLOWSHIPS/SCHOLARSHIPS

MARCH 11, 2020

Understanding how to choose the correct activity type in KRPD can be challenging. It is important to capture the correct activity type, whether it be organized research, sponsored instruction, or another category, to ensure that CSU's calculation of Facilities & Administrative (F&A) costs and reporting are accurate.

The guidance below is meant to aid in making an accurate distinction between research and fellowships/scholarships. For a comprehensive guide on all activity types, refer to "Kuali Research Activity Type Definitions" on the OSP website.

Choosing between Fellowships/Scholarships and Research

Research

Organized research activities include rigorous inquiry, experimentation or investigation designed to increase scholarly understanding. Sponsored research activities are those organized research activities funded by external organizations such as federal, state, or private sponsors. This includes support for CSU investigators as well as externally-funded research training programs where the primary activity of the trainees is research.

Examples of when 'Research' should be selected as the activity type include:

- The project has a Principal Investigator (PI) and the PI/institution chooses the fellows/trainees/students
- Additional CSU costs outside the cost of directly supporting the students are allowed to support the program
- Indirect costs can be applied, either the federally-negotiated rate or rate limited per the sponsor guidelines

Examples of research programs include NIH Training (T) series and the NSF Research Traineeship (NRT) Program

Fellowships/Scholarships

Fellowships and scholarships are made for the benefit of an individual. Recipients are not required to perform service to the institution.

Examples of when 'Fellowships/Scholarships' should be selected as the activity type include:

- The proposal can be submitted directly by the fellow to the sponsor
- Allowable personnel costs are usually only stipends. There may be a cost of education allowance. Travel and supply costs may be allowed depending on the program/sponsor
- Generally, no indirect costs can be collected
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Examples of fellowship/scholarship programs include the NIH Fellowship (F) series and the NSF Graduate Research Fellowship Program (GRFP).

If you still have questions regarding what the activity type should be in KRPD, consult the guidance found here and/or reach out to your OSP RA/SRA team.

Blog and resource contributors: Kim Melville-Smith, Director of Post-Award and Assistant OSP Director; Liz Grinstead, Former Senior Research Administrator; Chris Carsten, eRA Systems Officer; David Schmidt, Former Assistant Director for Special Projects; Tricia Callahan Senior Education and Information Resource Officer; Kathryn O'Hayre & Shannon Irey Training and Information Coordinators