

Memo

To: BGS Faculty
From: Kelly Jordan-Sciutto, Ph.D.
Date: May 29th, 2020
Re: PhD and MD/PhD BGS Mentor Cap for FY2021

The FY2021 mentor cap (including tuition, fees, stipend and health insurance) to support BGS students in years 3+ will remain at **\$38,000**. This continues to be well below the current maximum allowable NIH support of trainees at **\$52,704**. Although BGS strives to maintain the lowest possible cost to mentors, we cannot predict future increases in tuition, the amount of support that will be available from training grants and institutional sources, or stipend increases that may be necessary to maintain parity with our peer institutions. Also, please remember that the actual cost of a graduate student in FY21 is \$80,575. As such, we ask that future cost increases and time to degree be included when planning future student support.

REVENUE NEUTRAL MODEL OF BGS SUPPORT: BGS student funding is based on a revenue neutral model. Each year, BGS pays out tuition, fees, health insurance, and stipends. Tuition is returned to BGS and is the foundation of the BGS student funding budget. (Note that ALL tuition income is devoted to student funding.) The remainder of the AID budget comes from external training and fellowship awards and mentor support. BGS does not control the levels of tuition, fees, and health insurance charged; these amounts are determined by the University. BGS controls only the stipend level, the number of students admitted each year, and the faculty mentor contribution to support of a student in their lab. The BGS-controlled factors are adjusted annually in connection with the other factors listed to enforce the revenue neutral model.

LENGTH OF BGS PhD SUPPORT: Students are fully BGS-supported for their first 21 months. In any given academic year, mentors of rising 3rd year students will begin their support of such students on June 1st.

LENGTH OF CD (MD-PhD) SUPPORT: Students are fully CD/MSTP are supported for their first 3 years of the program (i.e. Med Years 1-2, Grad Year 1). In any given academic year, mentors of rising 4th year students will begin their support of such students on July 1st.

MENTOR SUPPORT OF STUDENTS ON TRAINING GRANTS: Because training grants differ in the per trainee cost coverage, the level of mentor support for students on training grants varies. If training grants have not been correctly budgeted, the mentor contribution could increase from that indicated in the attached tables, but in ANY case, will NOT exceed the mentor cap of \$38,000.

MENTOR SUPPORT FOR PART OF AN ACADEMIC YEAR: If a mentor ends up supporting a student for only part of an academic year, their financial responsibility will depend on several factors. Therefore, mentors are requested to contact the BGS office as early as possible, so that BGS staff can calculate the support required for that student.

MENTOR SUPPORT OF STUDENTS WITH INDIVIDUAL EXTRAMURAL AWARDS: Students who receive extramural fellowship awards relieve mentors of a portion of these costs depending on the source and on fund restrictions. Mentors are requested to contact the BGS office with details of these awards, so that BGS staff can calculate the support required for that student. However, the award itself does not eliminate the mentor's contribution. The attached tables indicate the typical distribution of costs among extramural award, mentor, and BGS for students at different stages of training.

Because of repeated misunderstanding of these issues, please note the following:

1. The responsibility of mentors for funding MD/PhD and PhD trainees is the same.
2. There is a real incentive for faculty participation on training grants (NIH and others). Cost per year to mentors of students on training grants **range**, with a minimum anticipated charge of \$12.2k and a maximum of \$26.4k. This range is well below the current Mentor Cap.
3. Federal research grant funds (e.g. RO1 and PO1) may be used to compensate students that are also placed on training (T32/T35/F30/F31) grants. As per NIH rules, a trainee may receive *compensation* from an NIH grant when providing services. Tuition remission and other forms of compensation paid as, or in lieu of, stipends to students (including fellows and trainees) under research grants are allowable, provided the following conditions are met: a) The individual is performing activities necessary to the grant; b) tuition remission and other forms of compensation are consistently provided, in accordance with established institutional policy, to students performing similar activities conducted in non-sponsored as well as in sponsored activities; c) during the academic period, the student is enrolled in an advanced degree program at a grantee or affiliated institution and the activities of the student in relation to the federally sponsored research project are related to the degree program. Under Penn rules, such students are full-time graduate students appointed for research directly related to the area in which his or her degree is to be conferred and in which **equivalent research is required of all candidates as a condition for receiving such a degree**. Additional information will be provided to departmental business administrators as requested.
4. Full tuition (\$37,678) is paid to the University for BGS students in years 1-5. This is a University requirement. This means that the balance of costs following the contribution by the mentor and/or a training grant is paid by BGS, not waived. The total cost of tuition, fees, health insurance and stipend for this academic year will be \$80,575 per BGS (straight PhD) student in years 1-5 and \$105,338 per Combined Degree (MD/PhD) student in years 1-2 and then \$80,575 in years 3-5 (as a result of the flat PhD tuition policy initiated by the University, starting in Fy09).
5. The maximum duration for training grant appointments (to one or more grants) is **five years** for PhD students and **six years** for MD/PhD students; this includes MSTP appointment

time. Please be aware that in recent years, some NIH agencies have been refusing extension requests for a 6th year of training grant support for MD/PhD students.

6. **Student cost to mentors is the same regardless of the funding source.** At the time the University initiated its flat PhD tuition policy (Ay09), it eliminated the Provost's Subvention match. Consequently, a student supported from special purpose funds, gifts and/or endowments, start-up funds, clinical and/or tech transfer accounts costs the same as those supported by research grants.
7. **BGS supports its students throughout their career as graduate students, starting from 100% support in the first 21 months, ranging between 13% - 51% in years 3-5. In AY21, the total cost of stipend/tuition/fees/health for all BGS students will be approximately \$55m, of which \$30m will be covered by BGS/University and \$18m will be from mentor funds.**

FY21: BGS STUDENT COSTS BY TYPE OF FUNDING SUPPORT AND YEAR										
PhD High Tuition										
Tuition	\$ 37,678	Years 1-2								
Gen. Fees	\$ 3,452									
Tech. Fees	\$ 1,082									
Health	\$ 4,363		TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
Stipend	\$ 34,000		\$ 21,678	\$ 3,452	\$ 1,082	\$ 2,363	\$ 8,680	\$ 37,255		
TOTAL	\$ 80,575		\$ 16,000	\$ -	\$ -	\$ 2,000	\$ 25,320	\$ 43,320		
			\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ 34,000	\$ 80,575		
PhD Reduced Tuition		Years 1-2								
Diss Tuition	\$ 4,708									
Diss Gen fees	\$ 874		TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
Health	\$ 4,363		\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ 34,000	\$ 80,575		
Stipend	\$ 34,000									
TOTAL	\$ 43,945	Years 3-5								
			TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
			\$ 10,839	\$ 3,452	\$ 1,082	\$ 2,363	\$ 8,680	\$ 26,416		
			\$ 10,839	\$ -	\$ -	\$ -	\$ -	\$ 10,839		
			\$ 16,000	\$ -	\$ -	\$ 2,000	\$ 25,320	\$ 43,320		
			\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ 34,000	\$ 80,575		
		Years 3-5								
		Years 3-5								
			TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
			\$ 11,000	\$ -	\$ -	\$ -	\$ 27,000	\$ 38,000		
			\$ 11,000	\$ -	\$ -	\$ -	\$ -	\$ 11,000		
			\$ 15,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ 7,000	\$ 31,575		
			\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ 34,000	\$ 80,575		
		Years 3-5								
		Years 6+								
			TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
			\$ 2,354	\$ 874	\$ -	\$ 4,363	\$ 34,000	\$ 41,591		
			\$ 2,354	\$ -	\$ -	\$ -	\$ -	\$ 2,354		
			\$ 4,708	\$ 874	\$ -	\$ 4,363	\$ 34,000	\$ 43,946		
		Years 6+								
			TUITION	GEN. FEES	TECH. FEES	HEALTH	STIPEND	TOTAL		
			\$ 320	\$ 874	\$ -	\$ 2,363	\$ 8,680	\$ 12,237		
			\$ 320	\$ -	\$ -	\$ -	\$ -	\$ 320		
			\$ 4,068	\$ -	\$ -	\$ 2,000	\$ 25,320	\$ 31,388		
			\$ 4,708	\$ 874	\$ -	\$ 4,363	\$ 34,000	\$ 43,946		

CD: MD Tuition		FY21: STUDENT COSTS BY TYPE OF FUNDING SUPPORT AND YEAR								
Tuition	\$ 62,008									
Gen Fees	\$ 3,452	Years 1-2	COSTS FOR NON-MSTP STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) & CD SUPPLEMENT							
Tech Fees	\$ 1,460									
Dis. Ins	\$ 55									
Health	\$ 4,363									
Stipend	\$ 34,000									
Total	\$ 105,338									
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			CD Cost	\$ 46,008	\$ 3,452	\$ 1,460	\$ 2,363	\$ 55	\$ 8,680	\$ 62,018
			TG Cost	\$ 16,000	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 43,320
			TOTAL CC	\$ 62,008	\$ 3,452	\$ 1,460	\$ 4,363	\$ 55	\$ 34,000	\$ 105,338
CD: PhD High Tuition										
Tuition	\$ 37,678	Years 1-2	COSTS FOR MSTP STUDENTS SUPPLEMENTED BY CD							
Gen. Fees	\$ 3,452									
Tech. Fees	\$ 1,082									
Health	\$ 4,363									
Stipend	\$ 34,000									
TOTAL	\$ 80,575									
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			CD Cost	\$ 41,008	\$ 3,452	\$ 1,460	\$ 2,363	\$ 55	\$ 8,680	\$ 57,018
			MSTP Cos	\$ 21,000	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 48,320
			TOTAL CC	\$ 62,008	\$ 3,452	\$ 1,460	\$ 4,363	\$ 55	\$ 34,000	\$ 105,338
CD: PhD Reduced Tuition										
Diss Tuition	\$ 4,708	Year 3	COSTS FOR NON-MSTP STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) & CD SUPPLEMENT							
Diss Gen f	\$ 874									
Health	\$ 4,363									
Stipend	\$ 34,000									
TOTAL	\$ 43,945									
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			CD Cost	\$ 21,678	\$ 3,452	\$ 1,082	\$ 2,363	\$ -	\$ 8,680	\$ 37,255
			TG Cost	\$ 16,000	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 43,320
			TOTAL CC	\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ -	\$ 34,000	\$ 80,575
CD: In clinics										
Gen Fees	\$ 3,452	Year 3	COSTS FOR MSTP STUDENTS SUPPLEMENTED BY CD							
Tech Fees	\$ 1,460									
Dis. Ins	\$ 55									
Health	\$ 4,363									
Stipend	\$ 34,000									
TOTAL	\$ 43,330									
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			CD Cost	\$ 21,678	\$ 3,452	\$ 1,082	\$ 2,363	\$ -	\$ 8,680	\$ 37,255
			MSTP Cos	\$ 16,000	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 43,320
			TOTAL CC	\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ -	\$ 34,000	\$ 80,575
		Years 4-5	COSTS FOR CD STUDENTS ON RESEARCH GRANTS WITH CD SUPPLEMENT							
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			Mentor Cos	\$ 11,000	\$ -	\$ -	\$ -	\$ -	\$ 27,000	\$ 38,000
			SOM Subv	\$ 11,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,000
			CD Cost	\$ 15,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ -	\$ 7,000	\$ 31,575
			TOTAL CC	\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ -	\$ 34,000	\$ 80,575
		Years 4-5	COSTS FOR NON-MSTP STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) WITH MENTOR SUPPORT & CD SUPPLEMENT							
			TUITION	GEN. FEE	TECH. FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			Mentor Cos	\$ 10,839	\$ 3,452	\$ 1,082	\$ 2,363	\$ -	\$ 8,680	\$ 26,416
			SOM Subv	\$ 10,839	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,839
			TG Cost	\$ 16,000	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 43,320
			TOTAL CC	\$ 37,678	\$ 3,452	\$ 1,082	\$ 4,363	\$ -	\$ 34,000	\$ 80,575
		Year 6+	COSTS FOR MD-PHD STUDENTS ON RESEARCH GRANTS							
		(Thesis)								
			TUITION	GEN. FEE	TECH FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			Mentor Cos	\$ 2,354	\$ 874	\$ -	\$ 4,363	\$ -	\$ 34,000	\$ 41,591
			SOM Subv	\$ 2,354	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,354
			TOTAL CC	\$ 4,708	\$ 874	\$ -	\$ 4,363	\$ -	\$ 34,000	\$ 43,945
		Year 6+	COSTS FOR MD-PHD STUDENTS ON TRAINING GRANTS							
		(Thesis)								
			TUITION	GEN. FEE	TECH FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			Mentor Cos	\$ 1,618	\$ 874	\$ -	\$ 2,363	\$ -	\$ 8,680	\$ 13,535
			TG Cost	\$ 3,090	\$ -	\$ -	\$ 2,000	\$ -	\$ 25,320	\$ 30,410
			TOTAL CC	\$ 4,708	\$ 874	\$ -	\$ 4,363	\$ -	\$ 34,000	\$ 43,945
		Year 7	COSTS FOR MD-PHD STUDENTS							
		(Thesis & Clinics)								
			TUITION	GEN. FEE	TECH FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			Mentor Cos	\$ 1,177	\$ 1,726	\$ -	\$ 2,182	\$ -	\$ 17,000	\$ 22,085
			SOM Subv	\$ 1,177	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,177
			CD Cost	\$ -	\$ 1,726	\$ 730	\$ 2,182	\$ -	\$ 17,000	\$ 21,638
			TOTAL CC	\$ 2,354	\$ 3,452	\$ 730	\$ 4,363	\$ -	\$ 34,000	\$ 44,899
		Year 7	COSTS FOR MD-PHD STUDENTS							
		(In Clinics)								
			TUITION	GEN. FEE	TECH FEE	HEALTH	DIS. INS.	STIPEND	TOTAL	
			CD Cost	\$ -	\$ 3,452	\$ 1,460	\$ 4,363	\$ 55	\$ 34,000	\$ 43,330
			TOTAL CC	\$ -	\$ 3,452	\$ 1,460	\$ 4,363	\$ 55	\$ 34,000	\$ 43,330