

# Memo

**To:** BGS Faculty

**From:** Susan R. Ross, PhD *SRR*

**Date:** June 30th, 2011

**Re:** Ph.D. and M.D./Ph.D. BGS Mentor Cap for FY2012

---

The FY2012 mentor cap (including tuition, fees, stipend and health insurance) to support BGS students in years 3+ will be \$33,520. This continues to be well below the current maximum allowable NIH support of trainees at \$38,496. 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 FY12 is \$63,072. As such, we ask that future cost increases and time to degree be included when planning future student support.

**LENGTH OF BGS SUPPORT:** Students are fully BGS supported for 21 months. In any given academic year, mentors of rising 3<sup>rd</sup> year students will begin their support on June 1st.

**EXCEPTIONS TO THE MENTOR CAP:** If a mentor is supporting his/her student using departmental or other funds that are not research grants, then the costs to mentors could be higher than the mentor cap. If this is applicable to you, please contact Nam Narain at 573-2234 or [narain@mail.med.upenn.edu](mailto:narain@mail.med.upenn.edu).

**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 \$34,020.

**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 EXTRA-MURAL 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 replace the mentor's contribution.

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

1. The responsibility of mentors for funding M.D.-Ph.D. and Ph.D. trainees is identical!
2. There is a real incentive for faculty participation on training grants (NIH and others). Cost to mentors of students on training grants *range*, with a minimum anticipated charge of \$18,142 and a maximum of \$29,000.
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, wages to students (including fellows and trainees) under research grants are allowable, provided the following conditions are met: The individual is performing activities necessary to the grant; 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; 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 student 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 (\$26,660) 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 \$63,072 per BGS (straight PhD) student in years 1-5 and \$81,888 per Combined Degree (MD-PHD) student in years 1-2 and then \$63,072 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 Ph.D. students and **six years** for M.D.-Ph.D. students; this includes MSTP appointment time.

| FY12: MD-PHD STUDENT COSTS BY TYPE OF FUNDING SUPPORT AND YEAR |           |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
|--|-----------|------------------|--|--------------------|------------------|-----------------|-----------------|-----------------|--------------|------------------|------------------|
| <b>CD: MD Tuition</b>  |           |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Tuition  | \$ 45,498 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Gen Fees   | \$ 2,318  | <b>Years 1-2</b> | <b>COSTS FOR NON-MSTP STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) &amp; CD SUPPORT</b>           |                    |                  |                 |                 |                 |              |                  |                  |
| Tech Fees  | \$ 1,012  |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Dis. Ins   | \$ 48     |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Health   | \$ 3,012  |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Stipend  | \$ 30,000 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Total  | \$ 81,888 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | CD Cost            | \$ 24,498        | \$ 2,318        | \$ 1,012        | \$ 1,012        | \$ 48        | \$ 8,400         | \$ 37,288        |
|  |           |                  |  | TG Cost            | \$ 21,000        | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 44,600        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 45,498</b> | <b>\$ 2,318</b> | <b>\$ 1,012</b> | <b>\$ 3,012</b> | <b>\$ 48</b> | <b>\$ 30,000</b> | <b>\$ 81,888</b> |
| <b>CD: PhD High Tuition</b>                                    |           |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Tuition  | \$ 26,660 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Gen. Fees (high)   | \$ 2,318  | <b>Years 1-2</b> | <b>COSTS FOR MSTP STUDENTS SUPPORTED BY CD</b>   |                    |                  |                 |                 |                 |              |                  |                  |
| Tech. Fees   | \$ 1,082  |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Health   | \$ 3,012  |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Stipend  | \$ 30,000 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| TOTAL  | \$ 63,072 |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | CD Cost            | \$ 24,498        | \$ 2,318        | \$ 1,012        | \$ 1,012        | \$ 48        | \$ 8,400         | \$ 37,288        |
|  |           |                  |  | MSTP Cost          | \$ 21,000        | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 44,600        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 45,498</b> | <b>\$ 2,318</b> | <b>\$ 1,012</b> | <b>\$ 3,012</b> | <b>\$ 48</b> | <b>\$ 30,000</b> | <b>\$ 81,888</b> |
| <b>CD: PhD Reduced Tuition</b>                                 |           |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
| Diss Tuition   | \$ 3,334  | <b>Year 3</b>    | <b>COSTS FOR NON-MSTP STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) &amp; CD SUPPORT</b>           |                    |                  |                 |                 |                 |              |                  |                  |
| Diss Gen fees  | \$ 538    |                  |  |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | CD Cost            | \$ 10,660        | \$ 2,152        | \$ 1,082        | \$ 1,012        | \$ -         | \$ 8,400         | \$ 23,306        |
|  |           |                  |  | TG Cost            | \$ 16,000        | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 39,600        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 26,660</b> | <b>\$ 2,318</b> | <b>\$ 1,082</b> | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 62,906</b> |
|  |           | <b>Year 3</b>    | <b>COSTS FOR MSTP STUDENTS SUPPORTED BY CD</b>   |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | CD Cost            | \$ 10,660        | \$ 2,318        | \$ 1,082        | \$ 1,012        | \$ -         | \$ 8,400         | \$ 23,472        |
|  |           |                  |  | MSTP Cost          | \$ 16,000        | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 39,600        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 26,660</b> | <b>\$ 2,318</b> | <b>\$ 1,082</b> | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 63,072</b> |
|  |           | <b>Years 4-5</b> | <b>COSTS FOR CD STUDENTS ON RESEARCH GRANTS WITH CD SUPPORT</b>  |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | Mentor Cost        | \$ 9,520         | \$ -            | \$ -            | \$ -            | \$ -         | \$ 24,000        | \$ 33,520        |
|  |           |                  |  | SOM Subvention     | \$ 9,520         | \$ -            | \$ -            | \$ -            | \$ -         | \$ -             | \$ 9,520         |
|  |           |                  |  | CD Cost            | \$ 7,620         | \$ 2,318        | \$ 1,082        | \$ 2,727        | \$ -         | \$ 6,000         | \$ 19,747        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 26,660</b> | <b>\$ 2,318</b> | <b>\$ 1,082</b> | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 63,072</b> |
|  |           | <b>Years 4-5</b> | <b>COSTS FOR MD-PHD STUDENTS ON NRSA'S (INDIVIDUAL FELLOWSHIPS/TRAINING GRANTS) WITH MENTOR &amp; CD SUPPORT</b> |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH. FEES      | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | Mentor Cost        | \$ 5,330         | \$ 2,318        | \$ 1,082        | \$ 1,012        | \$ -         | \$ 8,400         | \$ 18,142        |
|  |           |                  |  | SOM Subvention     | \$ 5,330         | \$ -            | \$ -            | \$ -            | \$ -         | \$ -             | \$ 5,330         |
|  |           |                  |  | TG Cost            | \$ 16,000        | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 39,600        |
|  |           |                  |  | CD Cost            | \$ -             | \$ -            | \$ -            | \$ -            | \$ -         | \$ -             | \$ -             |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 26,660</b> | <b>\$ 2,318</b> | <b>\$ 1,082</b> | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 63,072</b> |
|  |           | <b>Year 6+</b>   | <b>COSTS FOR MD-PHD STUDENTS ON RESEARCH GRANTS (Thesis)</b>   |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH FEES       | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | Mentor Cost        | \$ 1,667         | \$ 538          | \$ -            | \$ 3,012        | \$ -         | \$ 29,000        | \$ 34,217        |
|  |           |                  |  | SOM Subvention     | \$ 1,667         | \$ -            | \$ -            | \$ -            | \$ -         | \$ -             | \$ 1,667         |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 3,334</b>  | <b>\$ 538</b>   | <b>\$ -</b>     | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 35,884</b> |
|  |           | <b>Year 6+</b>   | <b>COSTS FOR MD-PHD STUDENTS ON TRAINING GRANTS (Thesis)</b>   |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH FEES       | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | Mentor Cost        | \$ 244           | \$ 538          | \$ -            | \$ 1,012        | \$ -         | \$ 8,400         | \$ 10,194        |
|  |           |                  |  | TG Cost            | \$ 3,090         | \$ -            | \$ -            | \$ 2,000        | \$ -         | \$ 21,600        | \$ 26,690        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 3,334</b>  | <b>\$ 538</b>   | <b>\$ -</b>     | <b>\$ 3,012</b> | <b>\$ -</b>  | <b>\$ 30,000</b> | <b>\$ 36,884</b> |
|  |           | <b>Year 7</b>    | <b>COSTS FOR MD-PHD STUDENTS (Thesis &amp; Clinics)</b>  |                    |                  |                 |                 |                 |              |                  |                  |
|  |           |                  |  | TUITION            | GEN. FEES        | TECH FEES       | HEALTH          | DIS. INS.       | STIPEND      | TOTAL            |                  |
|  |           |                  |  | Mentor Cost        | \$ 834           | \$ 291          | \$ -            | \$ 1,506        | \$ 48        | \$ 15,000        | \$ 17,679        |
|  |           |                  |  | SOM Subvention     | \$ 834           | \$ -            | \$ -            | \$ -            | \$ -         | \$ -             | \$ 834           |
|  |           |                  |  | CD Cost            | \$ -             | \$ 1,159        | \$ 506          | \$ 1,506        | \$ -         | \$ 15,000        | \$ 18,171        |
|  |           |                  |  | <b>TOTAL COSTS</b> | <b>\$ 1,667</b>  | <b>\$ 1,450</b> | <b>\$ 506</b>   | <b>\$ 3,012</b> | <b>\$ 48</b> | <b>\$ 30,000</b> | <b>\$ 36,683</b> |

