

Three Imperatives for Optimizing F&A Education and Advocacy Efforts

A Proactive Approach to Facilities and Administrative Funding: Part 1



Brooke Thayer Senior Analyst bthayer@eab.com

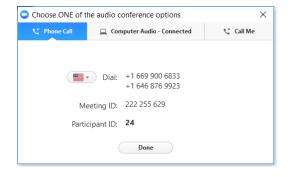
University Research Forum

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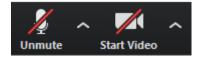


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A Proactive Approach to Facilities and **Administrative Funding**

Three Imperatives for Optimizing F&A Education and Advocacy Efforts 2

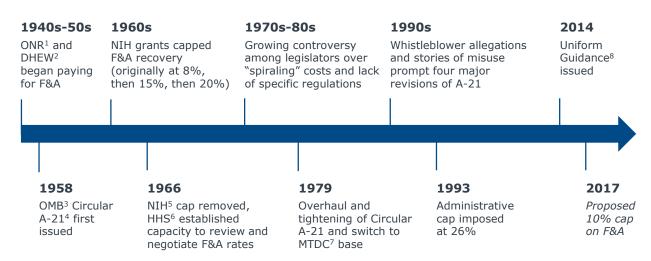
3 Questions?

F&A: Not a New Conversation



A Brief History of Facilities and Administrative (F&A) Funding

Evolution of F&A Policies: 1940 to Present



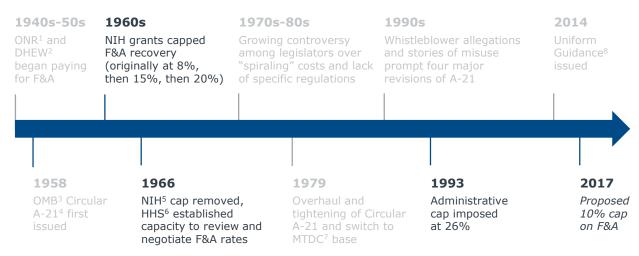
- 1) Office of Naval Research
- 2) Department of Health, Education, and Welfare
- Office of Management and Budget
- 4) Cost Principles for Educational institutions
- 5) National Institutes of Health
- 6) Department of Health and Human Services
- Modified Total Direct Costs (excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000)
- 8) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

F&A: Not a New Conversation



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The Latest Cap Proposal



Potential Devastation of 10% Cap

-\$4.6B

Estimated reduction in FY18 research funding

-\$92M

Estimated loss of funding to the University of Michigan

-\$195**M**

Estimated economic impact to the San Diego Region

Implications for the Research Enterprise



Fewer institutions conduct research



Limits on new award applications



Shrinking research portfolios



Prioritization of less expensive research



Closure of labs and facilities



Staff layoffs



"In all, the proposed cap would result in a **staggering blow to the nation's vital interest**. Universities would be forced to retrench by downscaling a research enterprise that has been a vital force in advancing discovery and human health...The **economic consequences would reverberate across the United States.**"

Ronald J. Daniels, President

JOHNS HOPKINS UNIVERSITY



Sources: EAB interviews and analysis; <u>University of Michigan</u>; Science Magazine, <u>NIH stays flat</u>, absorbs three institutes in president's 2019 budget proposal; U.S. House of Representatives Committee on Appropriations, <u>Written Testimony of Dr. Kelvin K. Droegemeier; University of Wisconsin Madison</u>; Issues in Science and Technology, <u>Perspective: Knee-Capping Excellence</u>.

Safe in the Near-Term



We Staved Off the Proposed 10% Cap...



CROs¹ lobbied on the Hill



Professional associations issued statements of opposition and developed F&A resources



CROs sent letters to faculty explaining the threat



Research experts advocate for F&A in congressional testimonies



Key members of Congress articulated support for F&A



Congress rejected the Trump administration's proposal in final FY18 budget

...But the Threat of Future Policy Changes Loom

More "Palatable" Rate Cap

- Higher percentage cap (~35%)
- Since current F&A rates vary from 20% to 85%, could create divisions among CROs and prove more difficult to challenge, especially given effective recovery rates

2 Implementing Cap at "Smaller" Agency

- Enact rate cap at a federal agency with a smaller budget than NIH (e.g., Department of Agriculture)
- Would establish a precedent for future caps

3 Proposed Salary Cap

- 2019 NIH budget proposal
- Only 90% of a PI's² total salary could be paid by grants
- Maximum amount of salary payable with NIH grant funds reduced from \$187K to \$152K

2017's Fight Revealed Critical Shortcomings



Three Shortcomings We Need to Proactively Address to Minimize Future Threats



Ineffective Communication

- Inconsistent terminology
- Inadequate preparation for legislator inquiries
- Messages don't resonate with stakeholders
- · Insufficient faculty education
- Lack of transparency





Leaving Dollars on the Table

- Chronic underrecovery
- Inadequate accounting of research space
- Ad hoc policies for industry sponsors and foundations
- Too many waiver approvals



We Need to Recover More



Nonstrategic Allocation Formula

- Distribution models based on F&A returns, not strategic need
- Insufficient data collection and tracking
- Delayed distribution
- Hesitancy to update current model



We Need to
Invest Smarter





9 Imperatives for Chief Research Officers

1

Communicate Better

- Invest in proactive preparation ahead of federal legislator inquiries
- Launch a multidimensional internal communications initiative
- Develop concise and shareable materials to broadly communicate F&A use

2.

Recover More

- 4) Maximize space audits to improve return rate
- Charge industry sponsors full (uncapped) F&A rate
- Develop and enforce a tiered policy for foundations
- Articulate appropriate circumstances for reduced or waived F&A

3.

Invest Smarter

- Strategically allocate research support funds to encourage desired behaviors
- Align distribution mechanism with goals and capabilities

A Proactive Approach to Facilities and Administrative Funding

Three Imperatives for Optimizing Education and Advocacy Efforts

3 Questions?

Fundamental Misunderstanding of F&A

About 30 percent of the grant money that goes out is used for indirect expenses, which...means that the money goes for something other than the research that's being done."

Tom Price, (Former) Secretary of Health and Human Services

Renewed Scrutiny of F&A



"Fundamental Misunderstanding" Fuels Legislative Concerns

Four Common Critiques of F&A

Inconsistent

A 10% cap "...would bring NIH's reimbursement rate for indirect costs more in line with the reimbursement rate used by private foundations, such as the Gates Foundation..."

Trump Administration FY18 Budget Proposal

Inefficient

"In a time of tough budgets, when only one out of five research grant proposals are funded, we must look at whether or not those overhead funds are being spent efficiently."

> Barbara Comstock (R-VA) Chair, Research and Technology Subcommittee

Inequitable

Indirect costs "would pay for 2,000 more scientific research projects. It raises the question of whether or not we have inadvertently created a system of 'haves and have nots,' where wealthy institutions benefit the most."

Lamar Smith (R-TX) Science Committee Chair



Opaque

"The question is, are the taxpayers paying for these costs in an efficient and transparent manner, or are we unnecessarily subsidizing excess, bureaucracy, and waste?"

Lamar Smith (R-TX) Chair, Science Committee

Sources: EAB interviews and analysis; APLU, Analysis of the Administration's FY2017 Budget Request; Congressman Lamar Smith, U.S. Congress probes underlying costs of research; Committee on Science, Space, & Technology, Statement of Chairman Lamar Smith.

Faculty Not on the Same Page



Some Common Faculty Perceptions...



F&A is a centrally administered "tax" on research that allows universities to "profit"



Direct costs are the only "real costs" of research—F&A **diverts dollars away** from supporting actual research



Universities intentionally keep F&A usage secret so they can use dollars as a "slush fund" rather than support PIs



Higher F&A rate will **hurt faculty chances** of a grant being funded

...Don't Align with Realities of F&A



F&A is a **partial reimbursement** for **costs already incurred** by the university to support research



F&A costs *are* **real costs**, without which faculty would not be able to conduct any research



Universities **reinvest** F&A dollars in the research enterprise

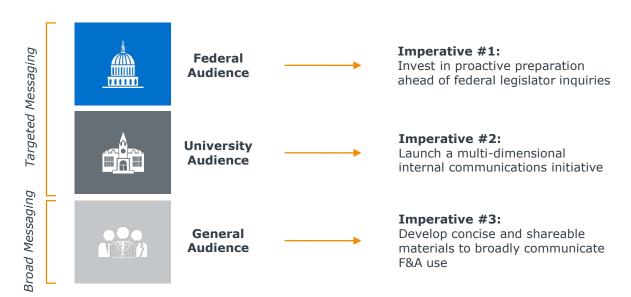


Little evidence that higher F&A rates negatively influence federal award decisions for individual investigators



Teaching Stakeholders About F&A

Three Imperatives for Optimizing Education and Advocacy Efforts



Missing the Mark



We Think We're Communicating Clearly...

...But Our Messages Aren't Changing Federal Legislators' Perceptions

-66

F&A **costs are real** and have to be covered. When we can't recover these costs, the **university has to subsidize** research, which leads to deficits in other areas.



66

We should provide money to universities only to fund research, not unrelated things like F&A.

"

-66

If you cap F&A, we would have to **close three labs** on our campus that employ 150 people and **reduce our research**.



-66

We already spend billions of dollars on research and support thousands of researchers. Even with reduced F&A, we would still support thousands of researchers.

7

Talking on the Hill



Making the Case for F&A at the Federal Level



Key Strategies for Successful Advocacy



Think about the issue from legislators' perspective



Identify areas of confusion and common misconceptions



Tailor messaging to address points of confusion



Craft arguments that align with legislative priorities



Case in Brief: University of Oklahoma

- Public, Doctoral University: Highest Research Activity located in Norman, Oklahoma
- \$250M+ in research expenditures in FY2016
- Drawing on experience testifying to the House of Representatives and speaking with policymakers in DC, Vice President for Research identified key areas of disconnect and common false assumptions of federal legislators
- Developed talking points that address confusion and resonate with legislative priorities

A Look Inside the Lawmaker's Mind



Pinpointing Where Their Confusion (and Frustration) Lie



Five Things We Have Not Effectively Communicated to Federal Legislators

1

History & Context



False Assumption:

F&A is a recent phenomenon, lacks oversight, and doesn't benefit the federal government or the public 2

Determining & Charging Rates



False Assumption:

Rates are arbitrarily determined and inflated, and universities are simply trying to game the system 3

Cost Sharing Mechanisms



False Assumption:

Universities overrecover F&A and aren't contributing their fair share to the public-private research partnership 4

Campus Utilization



False Assumption:

F&A dollars are a "slush fund" for universities

5

Policy Impact



False Assumption:

Reductions in F&A will not have any substantive impact on research productivity or national competitiveness

Misunderstanding

Lack of Awareness

Strengthening Our Response Repertoire



Talking Points for Addressing the Confusion



History & Context

- Longstanding academicgovernment partnership has made U.S. research the envy of the world
- Extensive and detailed rules have been added over time

2 Determining & Charging Rates

- Negotiated through complex, rigorous process
- Variations due to geography, institution type and size, and facilities
- Foundations supplement federal funding and categorize more items as direct costs

Cost Sharing Mechanisms

- Three main cost sharing mechanisms already in place (F&A cap, negotiated rates below actual costs, explicit cost sharing)
- 26% administrative cap applies only to universities

4 Campus Utilization

- Universities are more efficient performers of research than federal or industrial labs
- CROs need to boost transparency about how F&A reimbursement is used and how F&A is actually tracked

5 Policy Impact

- Overall reduction and increased concentration of research at wellendowed schools
- Loss of diversity in building our workforce
- Reduced support for faculty and staff
- Shifted cost burden to students

Key Takeaways

- ✓ Illustrate safeguards and restrictions already in place
- ✓ Explain reasoning for different charging policies
- √ Show how universities are playing their part

- ✓ Distinguish benefits of university research
- ✓ Acknowledge need for transparency
- ✓ Relate topic to national and legislative priorities

Relate Policy Impact to Legislative Priorities



Downstream Effects of Proposed F&A Cap





Significant scaling back of university research



Concentration of research at small number of well-endowed universities



Shifted cost burden to institutions



Reduced support for lab staff and administrative support









—

Immediate Impact

Un-doing of academicgovernment research partnership Less research to address key societal problems

Concentrated regional benefits, not leveraging full capabilities

Fewer opportunities for learning and diversity enhancement





Health and safety risks and violations





















Loss in global competitiveness, diminished national security



Worsening health and environmental conditions



Growing inequality



Reduced pipeline of trained and diverse scientists and engineers



Decreased student access and degree attainment



Damage to local economy



Reputational damage

Imperative #1: Next Steps



Getting Out Ahead of Future Federal Proposals

Five Federal Advocacy Steps for CROs

- Remind legislators of **how important** and impactful their support was in combating the proposed cap in 2017 (when applicable)
- 2 **Identify new legislators** and federal policymakers who may be "tough sells" and begin building relationships
- 3 Develop **education materials** designed for a federal audience
- Keep an ongoing record of examples of the importance and impact of F&A on your campus
- 5 Ensure F&A is always discussed as compensation for costs already incurred by the university

Federal Advocacy Avenues



When called upon, lobby on the Hill in-person, specifically focusing on your congressional delegation and relevant committee members



Collaborate with CROs and professional associations to streamline messaging and issue joint statements and reports



Attend conferences and planning sessions with federal agency representatives to develop non-legislative allies



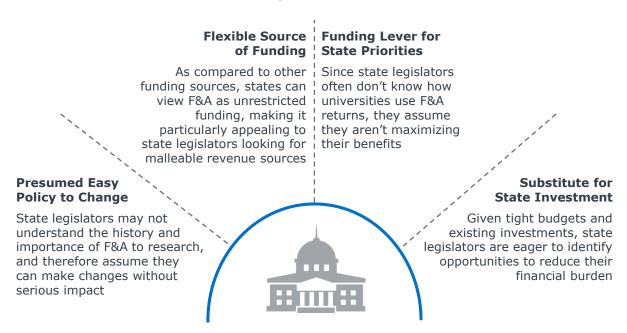
Equip faculty and federal relations team with accurate and shareable materials





Prepare a Unified, Tailored Response to State-Level F&A Policy Changes

Four Potential Reasons for State Legislative Interest in F&A Dollars



When the Threat Becomes a Reality



State Auditor Proposes Intervening in F&A Use







Initial Audit

Legislative audit following up on higher education system's management practices for operation and maintenance





Legislative Response

Senate Bill 156, State Facilities Amendments, requiring the Board of Regents to examine use of F&A to offset facility operations





System Response

USHE issued collaborative report to Infrastructure and General Government Appropriations Subcommittee

Case in Brief: Utah System of Higher Education (USHE)

- Comprised of Utah's 8 public colleges and universities, including its two research universities: University of Utah and Utah State University
- \$530M+ in research expenditures (system-wide) in FY2016
- In 2016, Utah legislature proposed requiring a set amount or percentage of F&A be dedicated to operation and maintenance (O&M) costs and asked the Utah Board of Regents to examine use of F&A
- USHE generated a report using targeted messages that resonated with state legislators to advocate for continued flexibility in institutions' ability to reinvest F&A dollars in the research enterprise

A Federal Answer to a State Problem?



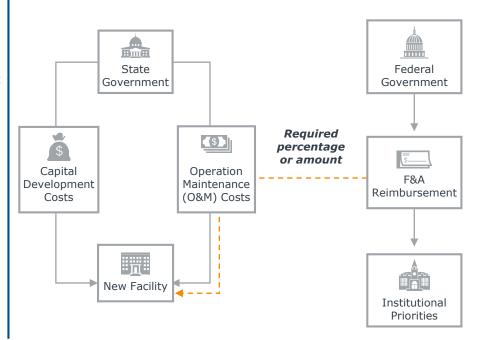
Legislature Wanted to Leverage F&A to Reduce State Costs



Utah Legislature's Interest in F&A

- O&M costs for facilities built using capital development funds require significant ongoing investment from legislature
- Sought ways to leverage other funds to cover current state O&M costs
- Federal research reimbursements looked to be flexible funding source that could be redirected to O&M costs

Proposed Diversion of F&A to O&M



Crafting a System-Wide Response



Utah System Report Tailored to State Legislative Priorities





Strategic use of scarce dollars



F&A dollars are strategically reinvested to advance the research enterprisethis includes spending 20-25% of F&A on facilities



Reputation of state universities



Institutional flexibility in reinvesting F&A dollars has led to significant research growth and improved institutional reputation these in turn benefit the community



Economic well-being of the state



The research enterprise has a positive economic impact on the state, and F&A is critical for maintaining that impact



Cost efficiency



USHF is proactively identifying opportunities to share infrastructure and resources and increase efficiency



Student experience



F&A is important for supporting araduate student education

Presenting a United Front





Unified System Response...



Sends more powerful message than any single institution could send on its own



Signals to legislators that this will not be an "easy win"



Demonstrates ability of "competing" institutions to collaborate



Prevents institutions from sending contradictory messages



Maximizes efficiency since it eliminated duplicate institutional efforts

...Helps Institutions Preserve Flexibility in F&A Use



No policy change was implemented



 Institutions are not required to dedicate set portion of F&A to O&M



 Legislators recognized that the potential advantages did not outweigh risks



State legislature has not proposed any other changes to F&A policies

Getting Out Ahead of State Proposals



Four Ways to Improve Your Response to State-Level Policy Proposals



Be Proactive

- Anticipate and prepare for state-level inquiries and critiques
- Develop talking points and educational materials designed specifically for state legislators

Collaborate with "Competitors"



- Establish processes for organizing cross-institutional working groups
- Develop unified response on critical issues before you are asked about them



Do Your Research

- Identify and track trends in your state legislature's priorities
- Know which topics and terms resonate with your particular legislators (and which ones don't)

Be Transparent (and Engaged)



- Provide state legislators with data on F&A use
- Always ask for a seat at the table for F&A discussions (so data isn't taken out of context or misinterpreted)

From the Hill to the Hall



CROs Haven't Prioritized F&A Education for Faculty and Staff

CRO Assumptions About Faculty

"It doesn't matter what I say about F&A-faculty are **never going to listen**."

"Faculty **don't actually** want to understand F&A."

"I can't control what faculty say or do, so **why even try** to educate them on F&A?"

"If I open up the books on F&A it's only going to **make** faculty more angry and my life more difficult."

Insufficient Internal Education Efforts



Difficult-to-digest official rate agreement posted online



Long-winded official statement in university policy catalog



General info not targeted to address faculty questions



F&A overview frequently left out of faculty orientation

Results of Ongoing Misunderstanding



More waiver requests



Perpetuation of myths internally



Spread of misinformation externally



Headaches for CROs

Communicating with a Faculty Focus



An Evolving Strategy for Internal F&A Education





Changed budget model and F&A distribution



Faculty misunderstanding and frustration



Waiver requests



Concern about researchers perpetuating F&A myths among external stakeholders

Internal F&A Education







Helped discourage and reduce F&A waiver requests



Improved internal understanding (especially at college-level)



Increased transparency about F&A returns



Equipped faculty with info and materials for external conversations



Case in Brief: University of Minnesota Twin Cities

- Public, Doctoral University: Highest Research Activity located in Minneapolis, MN
- \$910M+ in research expenditures in FY2016
- Developed portfolio of F&A education materials targeted to internal stakeholders through different mediums and varying levels of specificity
- Included a University of Minnesota-specific F&A infographic, brochure, and tailored roadshow presentations for faculty and staff audiences

Meeting Your Audience Where They Are



Different Materials and Mediums for Different Levels of Understanding



Basic Understanding

Medium:

Infographic

Target Audience:

Any faculty, staff, students, external stakeholders

Purpose:

Ultra-simple, streamlined graphic designed to provide base-level of understanding

Specificity:

Low

Intermediate Understanding

Medium:

Brochure

Target Audience:

All faculty and staff

Purpose:

Shareable one-page document designed to provide faculty and staff with critical info most relevant to them

Specificity:

Medium

Advanced Understanding

Medium:

Roadshow Presentation

Target Audience:

As many faculty and staff as possible

Purpose:

In-person presentations designed to provide faculty and administrators with more detailed info about F&A

Specificity:

High

Portfolio of Internal F&A Materials



Key Features of Each Educational Resource





- "Snap shot" of F&A
- Includes basic overview:
 - F vs. A
 - Notion of reimbursement and negotiation
 - · Administrative cap

2 Brochure



- Addresses common faculty and staff FAQs
- Includes more details than the infographic:
 - Current rates
 - Where rates come from
 - Minnesota's institutional subsidy
 - · Peer comparison

3 Roadshow







- Provides in-depth information tailored either to faculty or staff audience
- Includes more details than the brochure:
 - · History of F&A
 - F&A for organized research vs. instruction vs. sponsored activities
 - Recovery over time
 - · Inclusions and exclusions in F&A rate
 - · Common false misconceptions
 - Cost sharing and effect on F&A
 - F&A within the university's budget model
 - Instructions for accessing data on F&A generation

Click to download University of Minnesota's infographic, brochure, and faculty and staff presentations.

Imperative #2: Next Steps



Developing a Strategy for Educating Faculty and Staff

F&A Messages to Emphasize



Relatable examples of "F" versus "A" costs



Internal use of F&A dollars



Underrecovery and institutional subsidy



Peer comparisons



Cause of rising F&A rates (not due to rising central admin costs!)



Impact of no (or reduced) F&A on faculty



Common misconceptions (and why they're inaccurate)

Checklist of Internal F&A Education Strategies



Take **inventory** of current F&A materials and trainings



Compile list of most common faculty questions and misperceptions and develop responses to each



Update **website** and associated resources to address common faculty concerns



Develop simplified graphic depiction specific to your campus



Increase F&A's visibility on campus through roadshow presentations



Provide colleges/departments with shareable education materials



Incorporate F&A overview into new faculty orientation



Provide F&A updates during CRO quarterly/annual **presentations** to faculty senate and board of trustees



The Missing Link in F&A Education

Failure to Communicate Internal Utilization Fuels Confusion and Criticism

Communication and Education Efforts Tend to Focus on:







Differences across institutions

Underrecovery and effective F&A rates

F&A as real costs

Connection between use of F&A dollars and internal allocation of research support funds

Critical Stakeholder Sticking Points:

Lack of Transparency

- Faculty see that their awards generate F&A, but not what those dollars finance
- Faculty don't understand how individual PIs, colleges, departments, and/or units benefit from F&A returns
- Legislators assume F&A returns are being used as a "slush fund"

Unfair Allocation and Use

- Despite bringing in F&A through grants, faculty don't control (or understand) use of returns
- Faculty hear about differences in distribution and returns from peers in other colleges and/or departments, perpetuating perceptions of inequality and politically-charged allocation

Filling a Communications Void



Proposed Cap Prompted Creation of One-Pager for All Audiences









?



New Threat to F&A

Proposed 10% cap on F&A for NIH grants elevated the issue in 2017

Lack of F&A Materials

Hadn't updated or shared F&A-specific communications materials in previous seven years

Stakeholder Questions

Needed to address stakeholder questions, many of which related to F&A use

Accessible One-Pager

Created simple onepager, strategically including and excluding certain information



Case in Brief: University of North Carolina at Chapel Hill

- Public, Doctoral University: Highest Research Activity located in Chapel Hill, North Carolina
- \$1B+ in research expenditures in FY2016
- Recognized that F&A communications did not include information about internal distribution and use of F&A dollars, which is a key concern for faculty and state legislators
- Developed publicly accessible one-pager that visually represents how each research dollar is used to cover direct costs versus facilities and administrative costs, and then breaks down the proportion that goes to each F&A sub-category
- Designed to provide broad group of stakeholders with a basic understanding of F&A—the one-pager can be customized for the intended audience, as needed

Visually Representing a "Research Dollar"



Creating a Clear and Compelling One-Pager

THE UNIVERSITY

at CHAPEL HILL

Key Features

Definition

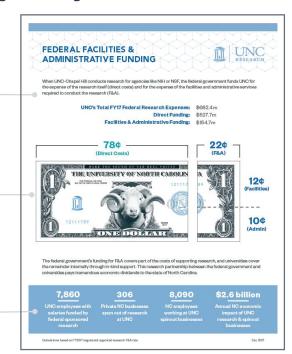
Distinguishes between costs of research itself and cost of facilities and administrative services required to conduct research

Visual Representation

Using a dollar and visually dissecting it into categories of research costs makes abstract concept more concrete and digestible

Research Impact

Highlighting the tangible community and economic impact of research reminds audience of positive outcomes of funding and reinvesting in research



Click to download UNC Chapel Hill's one-pager.

Breaking a "Research Dollar" Down into Cents



Three Levels of Increasing Specificity







Direct Costs vs. F&A

Illustrates how vast majority of every dollar goes to direct research costs, addressing a common faculty concern

Facilities vs. Administrative

Shows breakdown of F&A into two parts, with more being allocated to facilities—this may surprise many stakeholders

Subcategories of F&A

Explains F&A subcategories and allocation to each—helps faculty make connections between F&A and actual services and resources they benefit from as researchers



Click to download UNC Chapel Hill's one-pager.

Tempered Transparency



Carefully Select What to Emphasize and/or Deemphasize



Strategic Exclusions



Institutional subsidy



Rationale





Actual F&A rate



Avoids confusing audience with counterintuitive, difficult-to-explain F&A rate-setting process



Notion of reimbursement



Avoids creating state legislator confusion around the term "reimbursement"



Non-federal F&A recovery



Avoids creating unnecessary noise and confusing stakeholders about different rates and recovery

Message Customization

- Excluded info can be added to the one-pager as needed, depending on the audience
- Much of the excluded info is shared verbally in one-on-one conversations
- Strategic exclusion allows UNC to address some issues on a case-by-case, less formal basis
- Prevents "information overload," especially for external stakeholders

Deciding to Open Up the Books



Transparency Helps Demystify F&A Use



Numerous Challenges and Risks...



Disconnect between research accounting and allocation data



Difficulty calibrating message given multiple issues and audiences



Opens the institution and research office up to critique, both internally and externally



Difficult questions and new pressures to reallocate or cut costs

...But Benefits of Strategic Transparency Outweigh Them



Addresses key stakeholder concerns by providing faculty and legislators with basic understanding of F&A use



Helps debunk commonly held myths about central institutional spending of F&A, which minimizes rumors and ensures conversations are based in fact

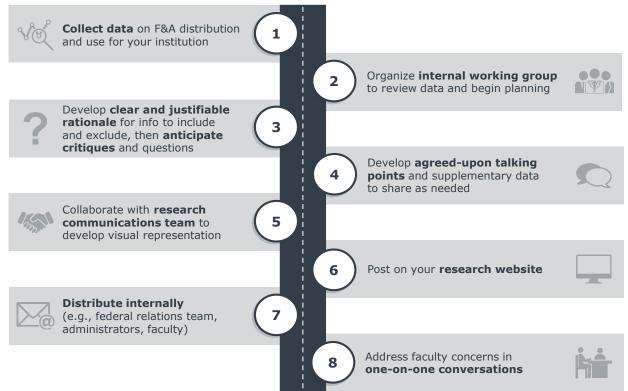


Moves the conversation forward by providing stakeholders with info needed to ask informed questions and engage in more productive dialogue

Imperative #3: Next Steps



Roadmap for Developing Your Own One-Pager



A Proactive Approach to Facilities and Administrative Funding

2 Three Imperatives for Optimizing F&A Education and Advocacy Efforts

3 Questions?

Reminder: Upcoming Webinar



How to Improve Your F&A Recovery and Refine Your Research Investment Strategy

A Proactive Approach to Facilities and Administrative (F&A) Funding: Part 2

Presenter



Jon Barnhart Consultant jbarnhart@eab.com

Webinar Details



Thursday, March 14 1:00pm – 2:00pm ET Register on eab.com

Any Questions?



Contact Information



Brooke ThayerSenior Analyst
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Evaluating Today's Session



Please take a minute to provide your thoughts on today's presentation.

Visit eab.com/FACommunications to access the F&A Communications Toolkit.

University Research Forum

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