Fellowship vs. Grant Matrix

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| **Anticipated Award Type** | **Definition** | **PI** | **COI** | **IDC** |
| Fellowship | Awarded to the specific individual and the award follows the individual should they leave UC San Diego. The individual will be mentored by a UC San Diego faculty member. The purpose of the award is to enhance an individual’s potential to develop into an independent researcher/scholar. | The named Fellow receiving the Fellowship is listed as the PI in ePD (PI exception is not required for Fellowships.) The mentor is listed as "Key Study Person" in KR PD.  | Not required. Fellowships will not trigger KCOI. | For industry with a sponsor policy, the federally-negotiated F&A rate applies unless it meets the criteria listed below. For all other sponsors, follow standard IDC practices. |
| Grant  | Awarded to the PI to fund a training or fellowship program. In this case, the PI oversees the program and selects the fellow/trainee. The award stays at UC San Diego and does not follow a fellow/trainee. This also applies to non-research supported activities (clearly distinguishable from research contracts which state anticipated outcomes in specific areas of corporate interest solicited by the corporation.) | The faculty member is listed as the PI in KR PD. | Required. Grants will trigger KCOI. | For industry with a sponsor policy, the federally-negotiated F&A rate applies unless it meets the criteria listed below. For all other sponsors, follow standard IDC practices. |

**It is critical that the anticipated award type is correct as it will affect the need to collect COI disclosure through KCOI. It is also important to complete the KR Key Personnel Tab as instructed per this guidance as this also affects COI.**

**To receive an IDC Exemption for a rate lower than the Federally negotiated rate, the following criteria must be met:**

1) Written sponsor policy.

2) All terms are limited and appropriate for a fellowship; these include but are not limited to:

(a) Intellectual Property and Rights in Data should remain silent. If included, confirm that the fellow has signed the Patent Acknowledgement. UC must retain ownership of all inventions and data. No licensing terms should be included.

(b) Publications: Should remain silent. If included, must maintain full freedom to publish, no restrictions.

3) Does not require specific deliverables other than final activity and financial reports. Final activity report should not require the delivery of data to the company (which would push the intent to research, not fellowship).

**Resources:**

Fellowship Overview: <https://blink.ucsd.edu/sponsor/ocga/guide/sponsored-research/fellowships.html>

Entering into KRPD: <https://blink.ucsd.edu/sponsor/ocga/guide/sponsored-research/fellowships.html#Building-Your-Kuali-Research-Re>

Knowledge Base Article (KBA): <https://support.ucsd.edu/research?id=kb_article_view&sys_kb_id=9a3063341b5e0d10506f64e8624bcb7f>