

CALIFORNIA INSTITUTE OF TECHNOLOGY
MINIMUM OVERHEAD REVIEW AND APPROVAL (MORA)

See [Proposal Information for Caltech](#) for applicable minimum overhead and tuition remission rates

PI NAME: DIVISION: DIVISION CONTACT NAME/EXT:

PROPOSAL TITLE:

SPONSOR* & PROGRAM NAME:

*If subaward, also list prime sponsor

Applicable Minimum OH Rate

TOTAL BUDGET

*If multi-year award, enter average annual budget

Minimum OH required by Caltech

MINIMUM OVERHEAD OPTIONS

a. OH in Budget (as allowed by sponsor)**:

** **Attach sponsor's overhead policy.**

b. Professorial salaries & benefits in budget:

c. Transfer from other funds:

PTA:

d. GB relief from tuition remission above base rate:

GRA tuition remission rates on non-federal funds

Total Minimum OH provided (sum a-d):

Effective OH	FY24	FY25*
20% or higher	57.00%	60.00%
between 15% & 19.9%	68.00%	71.00%
between 10% & 14.9%	77.00%	80.00%
less than 10%	85.00%	88.00%

Effective OH Rate:

Tuition Remission Rate to apply:

*Actual FY25 F&A rate and other rates to be confirmed

OH Assessment Options: Assessed off the top
Assessed on actual costs

COMMENTS:

PI (or designee) Approval (required):

Date:

Chair Approval (required if effective OH rate is less than the minimum required overhead rate):

Date:

Provost's Office Approval:

Date:

Distribution of approved MORA form:

Sponsored Research
Gift & Endowment Accounting
Budget Office
Advancement and Alumni Relations
Division

For administrative use only:

____ %OH to GB for awards that provide >20% OH