

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	FY26	FY27*
20% or higher	63.00%	64.00%
between 15% & 19.9%	74.00%	76.50%
between 10% & 14.9%	83.00%	86.50%
less than 10%	91.00%	94.00%

Effective OH Rate: _____

Tuition Remission Rate to apply: _____

*Actual FY27 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