

Guidelines For Allocating Sponsored Project Effort

Purpose

This document outlines the University of Oklahoma's guidelines for allocating effort on sponsored projects. The guidelines cover the following key areas:

- Academic Year Course Buy-Out
- Salary Release
- Summer Salary Supplements

Allocating Sponsored Project Effort

Effort distribution across the calendar year must accurately reflect the time spent on externally funded activities. For projects that span both the academic year and summer, effort must be allocated proportionally based on actual engagement during each period.

In compliance with federal regulations, Principal Investigators must confirm that effort expended on sponsored projects aligns with the salary charged to those projects. This confirmation must reflect actual effort expended and adhere to the specific terms and conditions of the award and sponsor policies.

Academic Year Course Buy-Out

Definition

A Course Buy-Out allows a faculty member to be released from instructional duties by using grant funds to cover a portion of their salary. This enables the faculty member to dedicate equivalent effort to an externally funded project. Approval for course release must be granted by the unit chair or director and authorized by the dean.

Process

- The faculty member's effort must be directly charged to the sponsored project in proportion to the time spent on the project. This is executed through submission of an EPAF (Electronic Personnel Action Form).
- When effort is charged to the grant, departmental funds are freed to cover the cost of the course buy-out.
- Course buy-outs are **never** a direct charge to the sponsored project.
- Adjunct faculty hired to cover instructional duties for the released faculty member must not be charged to the sponsored project.

Salary Release

Definition

Salary release occurs when a faculty member allocates effort to an externally sponsored project, thereby releasing a portion of their salary from departmental (EDGEN) funds. The released funds may be repurposed in accordance with College or Department policies. Common uses include:

- Hiring research support staff
- Purchasing research-related equipment
- Providing supplemental faculty compensation
- Funding additional research initiatives

Process

- The faculty member's effort must be directly charged to the sponsored project in proportion to the time spent. This is completed via an EPAF submission.
- Once charged to the grant, departmental funds become available for reallocation based on College/Department policy.
- Salary release is **never** a direct charge to the sponsored project.

Summer Salary

Definition

Summer salary refers to additional compensation paid to faculty members on 9-month academic appointments for work performed during the summer months—outside their regular academic-year contract. This compensation is in excess of the academic-year salary and must be based on actual effort expended during the summer.

Compliance Requirements

- Budgeted in the proposal and approved by the sponsor.
- Charged in proportion to actual effort on the sponsored project.
- Cannot allocate academic-year effort to summer salary, and vice versa. Each period must reflect the actual timing and scope of work.
- Additional work that is outside the faculty member's academic contract/institutional base salary is not impacted by summer salary payments on sponsored programs.