

# What's New with Vilas Awards?

## Symposium for Research Administrators, September 26, 2018

The William F. Vilas Trust Estate provides funding each year for the programs listed below. Under each link we have provided an overview of the award and specific terms that need to be followed according to the trust agreement. Links to additional information are found below the Vilas Award Details section. For questions or concerns, please contact Angie Johnson at 608-890-3147 or [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu).

### Summer Salary Rates for fiscal year July 1, 2018 - June 30, 2019

<https://www.rsp.wisc.edu/Vilas/salary.cfm>

For those awards that have summer salary, the amount is based on 2/9ths of the lowest paid Vilas Research Professor's salary payable in July and August of the award year.

Faculty Summer Salary = \$9,744 per month or \$19,488 total  
Fringe benefits will be charged to the award at the current rate.

**Vilas Award Website:** <https://www.rsp.wisc.edu/Vilas/index.cfm>

## Vilas Award Details

- Vilas Research Professorship Award
  - <https://www.rsp.wisc.edu/Vilas/vprofaward.cfm>
- Vilas Associates Award
  - <https://www.rsp.wisc.edu/Vilas/vassocaward.cfm>
- Vilas Distinguished Achievement Professorship Award
  - <https://www.rsp.wisc.edu/Vilas/vdistachprofaward.cfm>
- Vilas Faculty Mid-Career/Early Career Investigator Award
  - <https://www.rsp.wisc.edu/Vilas/vmidcareeraward.cfm>
- Vilas Research Investigator Award
  - <https://www.rsp.wisc.edu/Vilas/vresearchaward.cfm>
- Vilas Life Cycle Award
  - <https://www.rsp.wisc.edu/Vilas/vlifecycle.cfm>
- Vilas Retirement Award
  - <https://www.rsp.wisc.edu/Vilas/vretireaward.cfm>
- Vilas Fellowships & Scholarships Award
  - <https://www.rsp.wisc.edu/Vilas/vfellowshipaward.cfm>
- Vilas Encouragement of Merit and Talent (Music) Award
  - <https://www.rsp.wisc.edu/Vilas/vencourageaward.cfm>
- Vilas Supplemental Research Funds Award
  - <https://www.rsp.wisc.edu/Vilas/vsupplementalaward.cfm>

# Vilas Research Professorship Award

## Overview

- RSP will setup a new 133 project each fiscal year until the recipient retires or leaves the UW.
- The award period is July-June and is not negotiable.
- The award is set up and administered through the recipient's own department/college.
- Award provides faculty salary of \$10,000 and flexible research funds of \$50,000.
- Carryover to the next fiscal year and rebudgeting is not allowed per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of each fiscal year.
- Project number details and expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

## Expenditures

- Faculty salary is capped at \$10,000 each year. No fringe benefits are allowed on the award. RSP removes the fringe benefits each month at no charge to the department.
- Flexible funds may not be used to provide additional salary support for the award winner or other faculty members.
- Flexible funds may not be used for scholarships, fellowships or to direct charge tuition.
- Flexible funds may not be used to purchase alcohol.
- Items purchased with flexible funds are subject to the State, University and Department policies/guidelines, and procedures.

## **Two special awards available only to Vilas Research Professors**

# **Vilas Retirement Award**

## **Overview**

- Vilas provides \$2,500 each year to retired Vilas Professors.
- To qualify for the Vilas retirement award a faculty member has to have served 15 years as a Vilas Professor.
- Funds are added to award number MSN107185/133D085. Funds for the retirees are paid out of this fund for as long as they live. During the month of the faculty members passing a full month pay is issued and payments stop after that month.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

# **Vilas Supplemental Research Funds Award**

## **Overview**

- Vilas Professors can request supplement funding from the Vilas Trust for one year.
- A fund 133 project will be created and is assigned by Research and Sponsored Programs.
- The award covers one fiscal year; the period for which the grant is awarded is not negotiable.
- Carryover to the next fiscal year and rebudgeting is unallowable per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of each year.

## **Expenditures**

- Flexible funds are used for expenses incurred for Vilas Professor to perform research.
- The associated fringe benefit charges will be paid from this fund.
- Funds may not be used to pay faculty salary.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

# Vilas Associates Award

## Overview

- Award letters are provided by the Office of the Vice Chancellor for Research and Graduate Education.
- The award covers two fiscal years and award letters are sent out prior to the start of each fiscal year.
- RSP will setup a 133 project for each fiscal year.
- The award is set up and administered through the recipient's department/college.
- The award provides summer salary and fringe benefits for the award winner and flexible research funds (see details below).
- Carryover to the next fiscal year and rebudgeting are unallowable per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of each fiscal year.
- Project number details and expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

## Summer Salary

- Faculty who are paid on an annual (12 month) basis are only eligible for flexible research funds (see Flexible Fund details below).
- Faculty summer salary is for July and August pay periods of the award year only, no exceptions are allowed.
- Faculty summer salary is limited to 2/9ths of the lowest paid Vilas Research Professor's salary. This amount is subject to change each fiscal year. Summer salary amounts will be provided in the award letter and on the [Vilas Awards Main Page](#).
- Fringe benefits associated with faculty summer salary payments are provided as part of this award.

## Flexible Funds

- Flexible funds in the amount of \$12,500 are provided for each fiscal year. Flexible funds not spent during a fiscal year are lost. Carryover of is not allowed per the terms of the Vilas Trust. There are NO exceptions.
- Flexible funds may not be used to provide additional salary support for the award winner or other faculty members.
- If flexible funds are used for other salary support, the associated fringe benefit and tuition remission charges will also be paid from the flexible fund.
- Items purchased with flexible funds are subject to the State, University and Department policies/guidelines, and procedures.

# Vilas Distinguished Achievement Professorship Award

## Overview

- Award letter is provided by the Provost Office. **This is a five year professorship, however the Vilas funds only cover two fiscal years.** It is highly encouraged that the Vilas funds be spent within these two years, however an extension request for the remaining three years may be submitted to the Vice Provost Michael Bernard-Donals. The request will be submitted to the Vilas Trust on your behalf. If your extension is approved, you will receive an official notification letter from the Provost's office.
- RSP will setup a 133 project for two fiscal years in the amount of \$50,000 for the Vilas funded portion of the award. There is a required match of \$25,000 over the five year award period and a minimum requirement of \$5,000 match each fiscal year. RSP will review the match project budget each year to verify minimum requirement is met.
- **The department is responsible for setting up the match project and must provide the match project number to Angie Johnson before the 133 Vilas project number is assigned.**
- The award is set up and administered through the winner's own department/college.
- Unspent funds will be returned to the Vilas Trust at the end of the second year unless an extension is granted. If an extension is granted, any unspent funds would be returned to the Vilas Trust at the end of the project.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.
- As of September 2017, cost share expenses will not be tracked.

## Expenditures

**Please Note:** New summer salary and fringe benefit rules effective July 1, 2018

- Faculty can choose to use the funds for his/her summer salary only and the amount is limited to 2/9ths of the lowest paid Vilas Research Professor's salary. This amount is subject to change each fiscal year. Summer salary amounts will be provided on the [Vilas Awards Main Page](#).
- Faculty summer salary is for July and August pay periods for the first two years of the award only, no exceptions allowed.
- Faculty who are paid on an annual basis (12 month) are not eligible for any salary on this award.
- Fringe benefits will be charged for all personnel paid on the award.
- Flexible funds may not be used to provide additional salary support for the award winner or other faculty members.
- Flexible funds may not be used for scholarships, fellowships or to direct charge tuition.
- Flexible funds may not be used for the purchase of alcohol.
- Items purchased with flexible funds are subject to the State, University and Department policies/guidelines, and procedures.

# Vilas Faculty Mid-Career/Early Career Investigator Award

## Overview

- Award letter is provided by the Provost Office.
- Vilas provides up to \$50,000 of flexible research funds per year for one or two years.
- RSP will setup a 133 project for each fiscal year of the award.
- The award is set up and administered through the winner's own department/college.
- Unspent funds will be returned to the Vilas Trust at the end of the project.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

## Expenditures

**Please Note:** New summer salary and fringe benefit rules effective July 1, 2018

- Faculty can choose to use the funds for his/her summer salary only and the amount is limited to 2/9ths of the lowest paid Vilas Research Professor's salary. This amount is subject to change each fiscal year. Summer salary amounts will be provided on the [Vilas Awards Main Page](#).
- Faculty summer salary is for July and August pay periods for the first two years of the award only, no exceptions allowed.
- Faculty who are paid on an annual basis (12 month) are not eligible for any salary on this award.
- Fringe benefits will be charged for all personnel paid on the award.
- Flexible funds may not be used to provide additional salary support for the award winner or other faculty members.
- Flexible funds may not be used for scholarships, fellowships or to direct charge tuition.
- Flexible funds may not be used for the purchase of alcohol.
- Items purchased with flexible funds are subject to the State, University and Department policies/guidelines, and procedures.

# Vilas Research Investigator Award

## Overview

- Award letter is provided by the Provost's Office.
- A fund 133 project will be created and is assigned by Research and Sponsored Programs.
- The award covers one fiscal year; the period for which the grant is awarded is not negotiable.
- Vilas provides \$30,000 for hiring a Research Assistant (RA) or Project Assistant (PA) only.
- The award is set up and administered through the recipient's own department/college.
- Unspent funds will be returned to the Vilas Trust at the end of the project.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

## Expenditures

- Funds may only be used to hire an RA or PA. The associated fringe benefit and tuition remission charges will also be paid from this fund.

# Vilas Life Cycle Award

## Overview

- Award letters are provided by Women in Science & Engineering Leadership Institute (WISELI).
- These funds are provided by Vilas to help faculty and non-emeritus permanent PI's who have had some major life change. For example, a serious illness or maternity leave. This could be for the individual faculty member or a family member of the faculty.
- These awards are confidential and handled with discretion. The Faculty members name will not appear in WISDM or SFS.
- Projects are setup with the faculty member as Dean and RSP as the owning department. The project edits will list the faculty member's department number to allow for spending.
- RSP will setup a 133 project for each fiscal year of the award.
- The award start date can vary, however the end date is the end of the fiscal year.
- Carryover to the next fiscal year is unallowable per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of the project.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

## Expenditures

- Faculty who are awarded summer salary will have that amount paid in July and August of the award year only, no exceptions are allowed.
- Faculty who are paid on an annual (12 month) basis are not eligible for salary on this award.
- Faculty summer salary is limited to 2/9ths of the lowest paid Vilas Research Professor's salary. This amount is subject to change each fiscal year. Summer salary amounts will be provided in the award letter and on the [Vilas Awards Main Page](#).
- Fringe benefits will be charged for all personnel paid on the award.
- Funds may only be spent according to the budget. If you need to rebudget, please submit a rebudget request to Jennifer Sheridan at [jennifer.sheridan@wisc.edu](mailto:jennifer.sheridan@wisc.edu) and Angie Johnson at [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu).

# Vilas Fellowships & Scholarships Award

## Overview

- A fund 133 project will be created and is assigned by Research and Sponsored Programs.
- The award covers one fiscal year; the period for which the grant is awarded is not negotiable.
- Carryover to the next fiscal year and rebudgeting is unallowable per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of each year
- Scholarship project is managed through Student Financial Services. Fellowship project is managed through the VCRGE.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

# Vilas Encouragement of Merit and Talent (Music) Award

## Overview

- A fund 133 project will be created and is assigned by Research and Sponsored Programs.
- The award covers one fiscal year; the period for which the grant is awarded is not negotiable.
- Carryover to the next fiscal year and rebudgeting is unallowable per the terms of the Vilas Trust. There are NO exceptions.
- Unspent funds will be returned to the Vilas Trust at the end of each year.

## Expenditures

- The associated fringe benefit charges will be paid from this fund.
- Project number and allowable expenditure questions should be directed to Research and Sponsored Program's Angie Johnson, [astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu), 608-890-3147.

# Common Features of Vilas Awards

- All Vilas Awards are non-federal sponsored projects (fund 133-).
- A 133- project will be created by Research and Sponsored Programs for your use.
- No carryover of funds from one project to another.
- No rebudgeting allowed.
- Unspent funds have to be returned to Vilas at the end of the project period.
- The projects are set up and administered through the recipient's own department/college.
  - Exception: Vilas Lifecycle Award has RSP as home department with department edits, and Dean as PI.
- Items purchased with flexible funds are subject to State rules, University and Department policies/guidelines, and procedures.
- Flexible funds may not be used for scholarships, fellowships or to direct charge tuition.
- Flexible funds may not be used for the purchase of alcohol.
- Summer salary is limited to 2/9ths of the lowest paid Vilas Research Professor's salary, payable in July and August of the award year.
  - Exception: Vilas Research Professorships are exempt from the summer salary restriction
- Fringe benefits will be charged for all personnel paid on the award.
  - Exception: Vilas Research Professorships are exempt from fringe benefits.

## Best Practices

- Spend the award in the allotted time.
- Pay attention to spending limits on salary and flex funds.
- Plan ahead and spend down the award with time to spare before the deadline.
- Check with Research and Sponsored Programs if you have questions about financial matters.

# Common Problems with Vilas Awards

- Vilas Associates summer salary not spent or for the incorrect months.
  - Vilas Associates summer salary is for July or August, not the following June.
  - Vilas Associates summer salary cannot be used during the academic year.
  - A-basis (12 month) faculty do not receive the summer salary funds, only the flex funds.
  - If the summer salary goes unspent, the entire award, including the flex funds, is lost.
- Overspending of flex funds on Vilas Associate awards, rebudgeting not allowed.
  - Unspent salary funds cannot be reallocated to flex fund category.
  - Transfer of excess expenses to discretionary spending accounts will be required.
- Vilas Distinguished Achievement Professorships (VDAP) and Early-/Mid-career not spent. No-cost extensions are not guaranteed.
  - Best Practice: spend down during the award dates.
  - Vilas is reluctant to extend VDAPs beyond the initial 2 years.
  - Extensions to Early-/Mid-career awards are rare.
- Vilas Distinguished Achievement Professorships (VDAP) exceeding \$10,000 PI salary cap.
  - If this overspending is not discovered until the end of the award, it will be difficult to spend the funds that remain after the excess salary is transferred off the Vilas award.
- Research Investigator funds spent on supplies or travel expenses.
  - Limit spending to RA or PA salary, fringe and tuition remission only.
- Not spending the full amount of the award.
  - Unspent funds are lost. The terms of the Vilas Trust dictate the money be sent back to the sponsor for reinvestment.

# Vilas award project dates July 1, 2017 - June 30, 2018

**May-June 2017** RSP received annual award letter from William F. Vilas Trust.

RSP provides funding info to PI and department.

**July 1, 2017**



Award begins, expenditures allocated to project.

**May 30, 2018**

RSP sends 1st email, time to start reviewing expenditures!



**June 30, 2018**



Completion of Vilas Award, end date.

**July 30, 2018**

RSP sends 2nd e-mail: unallowable expenditures need to be removed by December 1.



**September 30, 2018**



RSP sends 3rd email: final notice to remove unallowable expenditures.

**October 30, 2018** Research begins on summer salary rates for next fiscal year.

**November 30, 2018** RSP transfers unallowables to appropriate suspense account.



**December 30, 2018** RSP submits final invoices and reports to William F. Vilas Trust.



**January 30, 2019** Summer salary rates for upcoming fiscal year are verified and posted to RSP Vilas webpage.

**February 1, 2019** RSP begins project closeout.



# Vilas Contacts

## FINANCIAL AND AWARD MANAGEMENT

### **RSP Post-Award Accountant for Vilas Awards:**

Angie Johnson

[astenli@rsp.wisc.edu](mailto:astenli@rsp.wisc.edu)

608-890-3147

\*Angie's email will be updated in October 2018, but her old mail will forward to her.

### **RSP Managing Officer overseeing Vilas Awards:**

John Varda

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608-265-5918

## APPOINTMENT INFORMATION

### **Provost's Office:**

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### **WISELI: (Vilas Life Cycle only)**

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