

Process for Cost Share Agreements, College of Engineering

Purpose: The intent of this process is to (1) help faculty find appropriate cost share when needed, (2) document all cost share sources in detail for both transparency and internal tracking purposes, (3) only commit OSU to the required and allowable cost share, and (4) provide timely feedback and help to PIs.

Summary: COE faculty/staff submitting proposals or pre-proposals with cost sharing or match from any source should consult with the **Engineering Research Administration office** well before submission, at coe.prewards@oregonstate.edu or 541-737-6518. A **detailed cost share authorization form is needed at the proposal stage** for transparency and internal tracking purposes. Our team can assist with cost share requirements, potential sources, budgets, forms, and clarifying university/sponsor/federal guidelines.

Expedited Process for Cost Share

If the cost share on a proposal **only** involves faculty time (up to one academic month per year per faculty member) and/or unrecovered indirect costs from a sponsor-limited rate, School Head **signature is not required** on the cost share authorization form. The Cayuse approval process will be sufficient. The completed cost share form will be provided to the School Head for information only, with the signature block replaced by a standard explanation.

All other cost share situations will require (1) working with the Engineering Research Admin. office and (2) School Head or designee signature on the cost share authorization form.

Cost Share Proposals Routed Without Help from Eng. Research Admin.

The Engineering Research Administration office reviews all proposals in Cayuse as the College-level approver. Depending on cost share complexity and documentation provided, the Cayuse proposal may be approved, held for more detail, or rejected at the College level.

- If the cost share only involves faculty time below the threshold listed above and/or unrecovered indirect costs, then we will (1) ask the PI to complete a detailed cost share form available on our website and (2) assign a Proposal Manager in case the PI wants help with the cost share documentation.
- If cost share involves any other sources and/or more faculty time than the above threshold, then a Proposal Manager will be assigned and the PI **must** work with our team to document cost share commitments.

Process for Preparing Cost Share Proposals with Eng. Research Admin.

1. The PI will work with a Proposal Manager to determine appropriate source(s) of cost sharing funds and total amount required. If cost sharing other than faculty effort and/or unrecovered indirect costs is necessary, the Proposal Manager will advise on process and timeline to request cost sharing from other sources, and assist as needed.

- a. Possible sources of cost share include the following:
 - **External** (third party) cost share sources such as industry partners, subawards, and matching awards.
 - **Internal** cost share sources such as faculty/staff time, internal gift or endowment funds, startup funds, departmental or other internal funds, waived user fees for equipment or facilities, indirect costs associated with cost shared expenses, and unrecovered indirect costs if the sponsor has limited the indirect cost rate.
 - Tuition waivers and F&A waivers require internal funds to cover these “waived” costs. F&A waivers in particular are rarely approved.
 - b. All other cost share sources should be considered before approaching the College or OSU Research Office for additional funds.
 - c. The Proposal Manager will send a draft cost share authorization form to the appropriate Grant Accountant for review of availability and allowability of other OSU cost share sources.
2. If any third party cost sharing is proposed, the PI will work with the Proposal Manager to request commitment letter(s) with the required details. **CAUTION:** If a third party cannot meet its stated obligation for cost sharing during the project, then the PI's School becomes the back-stop funding source for this committed cost share.
 3. The Proposal Manager will finalize the cost share authorization forms, obtain all appropriate signatures via DocuSign, and upload them to Cayuse. This includes any third party cost sharing commitment letters.
 4. **For voluntary cost sharing, evidence that cost sharing is a basis for competitiveness is required.** This may include specific language from the funding opportunity or published FAQs stating that cost sharing will be considered as part of the evaluation criteria. Your Proposal Manager can advise on this, and can also reach out to the sponsor for clarification if needed. OSRAA makes the final determination of cost sharing allowability.