

Cost Sharing Checklist

Recommended Checklist to Use with Mandatory and Voluntary Committed Cost Share

Note: OPD's Checklist is meant to serve as a guide on best practices to correctly and appropriately document cost share on projects. It **does not** represent policies and procedures for sponsors, campus administrative offices, and units/colleges on campus. Be sure to follow their policies and procedures when cost sharing on projects.

Review the solicitation to determine if cost sharing is mandatory or voluntary

If mandatory, determine:

- amount required (1:1 match, etc.)
- allowed resources to meet the commitment (contributed effort, hard match, in-kind, etc.)
- allowed expenses

Discuss with the proposal team

Determine the category of expenses that are appropriate to cost share, based on your project and the solicitation.

Discuss plans with relevant college and institute partners

If you are considering requesting cost share from departments/units, start discussions with the unit and/or department head(s) as early as possible in the proposal process. Let them know you will prepare a detailed budget and a formal request for support.

Discuss plans with administrative offices

If you are considering requesting cost share from administrative offices such as the OVCRI, start discussions as early as possible in the proposal process. Let them know you will prepare a detailed budget and a formal request for support.

Prepare a detailed, cost sharing budget

Use this budget for discussions with all unit and/or department head(s) and administrative offices such as OVCRI. At the time of proposal submission to SPA, this detailed budget should be provided for review. All costs must be allowable. In this budget, be sure to include direct costs, F&A costs, and unrecovered F&A costs, if allowable. Note that training grants such as NIH T32s or NSF NRT have special requirements:

- Feel free to contact OPD for a budget template for training grants.
- List fringe benefits as direct costs separately from salaries/wages and indicate unit(s) responsible for cost share*.
- Tuition and Fees for matching training slots is a hard match that should be listed as direct costs in the budget and indicate the unit(s) responsible for cost share.* List the entire projected amount.
- Tuition Remission can be lumped into in-kind and does not need to be identified by the unit(s) that will be responsible.

Calculate the ask and make the request

After preparing your budget, calculate the proportion of cost share that you will request from each unit. Note that the OVCRI contribution to cost sharing is limited to 30% of the total cash component of the cost-share for proposal solicitations that require cost-sharing. The OVCRI contribution is also subject to the availability of funds and calculation of the 30% maximum OVCRI contribution is limited to the amount contributed by all other non-OVCRI units.

Document the commitment

Documentation and support of cost sharing commitments must accompany the proposal documents submitted to SPA for review. Additionally, cost sharing must be approved prior to proposal submission. Refer to SPA's website: <https://sponsoredprograms.illinois.edu/research-topics/cost-sharing> and the Campus Admin Manual Policy: <https://cam.illinois.edu/policies/rp-05/>

If cost sharing with the OVCRI, official requests should be submitted well in advance of proposal submission AND following documented approval (an email trail copied to the appropriate departmental or college officers) from units/colleges. Refer to OVCRI's website: <https://research.illinois.edu/research-administration/cost-sharing-guidelines>

Make the request to OVCRI

Requests should be submitted as a single PDF file by email to OVCRI@illinois.edu. Requests must include:

- An explanation of the strategic importance of the research and other participating units and colleges;
- A statement of how the requested funds will be used;
- An indication of whether the cost-sharing is required or voluntary; and
- A detailed cost sharing budget that shows the total amount being shared and the units responsible.

Draft the letter of agreement for the OVCRI

If the VCRI is cost sharing and approves the cost-sharing request, the originating unit must prepare a [standard letter of agreement](#) and obtain electronic signatures from all participating units and colleges with a final routing to the OVCRI. The unit approver on the standard letter of agreement must match the unit approver on [SPA's website](#). The originating unit will provide copies of the approved document signed by all participating units and colleges to these units, and a copy with all signatures must be submitted to SPA with the proposal. Keep in mind that the process of getting all relevant signatures on the standard letter of agreement could take several days, and the letter of agreement must be submitted to SPA **five business days prior to submission to sponsor**.

Please note this standard letter of agreement is different from any letter of institutional support required by the sponsor and may or may not be submitted to the sponsor.

Submit the letter of agreement and/or documentation of support for cost share

Submit the signed standard letter of agreement and/or documentation of support along with a detailed cost sharing budget with the proposal to SPA before the proposal is submitted to the sponsor. Use the MyProposals portal to submit the letter. Tip: The OVCRI standard letter of agreement template may be used for documentation of support from departments/units on campus even when OVCRI is not cost sharing.

**Indicate unit(s) responsible for cost share, whether it is the OVCRI or another campus unit*

GOOD LUCK!