

# COST SHARE ADDENDUM INSTRUCTIONS

January 29, 2015, Rev. April 22, 2016



Office of Contracts and Grants  
UNIVERSITY OF COLORADO BOULDER

## Cost Share Addendum Process

For all proposals that include cost share, proposals must include:

- **Budget** with cost share itemized and contributor(s) accounted for
- **Cost Share Addendum** signed by all contributing parties prior to submission
- **Documentation** of in-kind and/or third party cost share, if applicable

## Proposal Budget

Cost share needs to be specifically and clearly budgeted on the proposal budget. Include:

- Column for cost share each year of the budget.
- Itemized account of cash and, if possible, third party cost share, i.e. the budget should not indicate "\$5,000 from Department" but should indicate on the appropriate budget line item exactly what budget item the Department is cost sharing, such as GRA salary or travel costs.
- Column indicating each budget line item cost share source (i.e. Department, VCR, Graduate School, etc.).
- If in-kind and/or external cost share is part of the cost share, include this cost share as budget line item(s) if possible. Otherwise include it as a total at the bottom of the budget.
- Include line for total cost share amount. This amount must match the total on the cost share addendum.

## Cost Share Addendum

While PIs/Department Admins can fill out the cost share addendum, it may be helpful for Proposal Analysts to fill it out.

### Top of Form and Required Signatures

- Choose Original Addendum if this is the first addendum for this project and Revised Addendum if the original cost share contribution has been revised.
- Fill in PI name, sponsor name, title, date, UCB proposal number, period of performance, and commitment parameters detailing the required cost share commitment (dollar amount or percentage and percentage base).
- Select the Cost Share Type and Commitment Type from the drop down lists.
- The total Committed Cost Share will calculate as you fill in the cost share amounts.
- For all cost share, PIs and Department Chairs/Directors must sign electronically through Adobe or DocuSign or by hand after the form is complete.
- Include the Department Chair/Director's printed name in the space provided.

### CU Cash Contributor Signatures

If CU parties other than the Department are contributing cost share:

- These parties must sign the cost share addendum. This includes CU Co-PIs and their Department Chair or Director.
- Provide printed names for each signer.
- Signatures are only needed for CU-Boulder contributors.
- Obtain signatures through Adobe or DocuSign or by hand after form is completed.

*A copy of the proposal budget should be provided along with the cost share addendum to all signing parties.*

### Commitment Summary

In this section, provide total amounts being contributed by category and/or contributor.

#### > Section 1: PI/Faculty Effort Salary

- If applicable, provide PI name, effort in percent of AY time being contributed each year, and dollar amount of contributed effort. Do not include fringe benefit costs.
- For all other Co-PIs/others contributing effort, enter total dollar amount. Do not include fringe benefit

costs.

- Dollar amount of contributed effort will be totaled. This amount should equal the amount of contributed effort on the proposal budget.

> Section 2: CU-Boulder Cash

If applicable, provide details of CU-Boulder cash contributions in this section. Note:

- “Other” contributors are only CU contributors.
- Identify Other contributors with Speedtypes.
- Include brief description of item(s) being contributed in Budget Item(s) column.
- Provide amount to be contributed for each year. The form will total each year.
- The totals for each contributor should match the totals for these contributors on the budget.
- Dollar amount of cash contributions will be totaled. This amount should equal the amount of cash contribution on the proposal budget.

> Section 3: Value of Fringe Benefits and F&A

As applicable, enter dollar amount of each category:

- Fringe benefits – Enter total cost share amount of fringe benefits. These could be fringe benefits charged on contributed effort or salaries being paid by CU contributors.
- F&A charged on cost share – Enter total of any F&A charged on the cost share portion of the budget
- Mandatory Waived or Unrecovered F&A – If F&A was waived or unrecovered due to sponsor policy on F&A rate and included as cost share, enter that total here. If the sponsor does not allow waived/unrecovered F&A as cost share, do not include this amount on the budget or form.
- Voluntary Waived F&A – If an indirect cost waiver was approved by CU (AVCR/Deputy Director), is allowable as cost share, and included as cost share on the budget, enter the total amount.
- Dollar amount of fringe benefits and F&A will be totaled. This amount should equal the amount of cost shared fringe benefits and F&A on the proposal budget.

> Section 4: Value of In-kind Cost Sharing

For in-kind cost share, go to tab 2-CS In-Kind and enter information. Descriptions of in-kind cost share as well as restrictions and mandatory documentation are provided on this worksheet.

- The top information will copy over from tab 1-CS Summary.
- Provide CU Boulder in-kind cost share in the first section, including budget item, name of contributor, description of contribution and total amount.
- Provide Third Party in-kind cost share in the second section, including budget item, name of contributor, description of contribution and total amount.
- Provide amount to be contributed for each year. The form will total each year.
- Mandatory documentation as described on tab 2-CS In-Kind must be provided for all in-kind cost share (CU and third party) with indication of why the in-kind cost share can be provided. Save this documentation in the proposal file with the cost share addendum.
- Totals entered on tab 2-CS In-Kind will copy to 1-CS Summary.
- Total of in-kind cost share should equal the total of in-kind cost share on the proposal budget.

> Section 5: Value of External Cost Sharing

For external, cash cost share (i.e. not in-kind cost share), go to tab 3-CS External and enter information. Guidelines for external cost share are provided on this worksheet.

- The top information will copy over from tab 1-CS Summary
- Provide Subcontractor Cash Contributions in the first section, including budget item, name of contributor, and total amount. If effort is part of subcontractor’s cost share, include this here.
- Provide other Third Party Cash Contributions in the second section, including budget item, name of contributor, and total amount. If effort is part of third party’s cost share, include this here.
- Provide amount to be contributed for each year. The form will total each year.
- Mandatory documentation as described on tab 3-CS External must be provided and saved in the proposal file with the cost share addendum.
- Totals entered on tab 2-CS In-Kind will copy to 1-CS Summary.

### **Check Totals**

The total of committed cost share on the Cost Share Addendum must match the total cost share on the proposal budget.

### **Obtain Signatures**

- Print the cost share addendum to PDF. If you need to include the entire workbook (all three tabs), go to Print and under settings, change Print Active Sheets to Print Entire Workbook. You can also choose what pages to print.
- Send PDF to PI for signatures. Signatures can be done electronically through Adobe or DocuSign or by hand.

### **Revised Cost Share**

If cost share is revised after submission of the original proposed budget and original cost share addendum is received, a revised addendum must be provided and signed so that the addendum matches the revised budget.