

## RSP CSWG Business Process #3 (How RSP will review CS at Proposal)

Last revised 1/7/11

### **ISSUE:**

The RSP Cost share working group needs a formal process on how RSP proposal group will approach proposal review/submission where proposals contain cost sharing.

### **PROCESS:**

1. After a Dean's office has approved cost sharing, a proposal will be developed.
  - a. Note: Some Dean's offices will use the cost sharing tool (CS Tool) developed by APR for granting approval of cost sharing.
2. The proposal will be entered into WISPER, as is the normal process.
3. If Campus is to submit the proposal, the Campus representative will go through CS checks.
4. If RSP is to submit the proposal, the RSP Proposal Team will:
  - a. Receive the assigned WISPER record as normal.
  - b. Check for CS information.
    - i. The WISPER general tab should be filled out by campus, to indicate approved cost sharing is offered in the proposal.

[Enter Protocol Certification Details Here](#)

Personnel

Name	Project Role	Outside Activities Report Submitted	Effort Requirements Met
		No	Yes

[Add Other Personnel to Record](#)

Proposed Budget

Direct Costs

F & A Costs

Total Costs

F & A Rate % 1.00

On Campus  Yes  No

Cost Sharing Included

Cost Sharing Amount

Cost Share Comments

- ii. The WISPER approval tab should be filled out by campus, to indicate Dean's office has reviewed and approved cost sharing in the proposal.

- iii. The WISPER attachments tab can optionally have the Cost sharing tool summary attached, to indicate Dean's office has approved a specific cost sharing plan, as devised by the PI/Dept.

General	Comments	Projects	Approvals	Attachments	Division Action	Terms	SPO Action	History
Record ID	MSN140889			Document Type	CosReimCon		<a href="#">Wisper Help</a>	
Contact PI	ROMERO, MANUELA			Sponsor Name	ACADEMY OF APPLIED SCIENCE			
Short Title	JSEHS			Status	4.5-SPO Negotiation			

  

Upload Attachment	File Name	File Description	Uploaded By	Upload Date/Time
1 <a href="#">Upload Attachment</a>	<a href="#">Financial_StatementRFP2011.doc</a>	Budget	REINHARD, MARGARET P	
2 <a href="#">Upload Attachment</a>	<a href="#">2011 Narrative Proposal.doc</a>	Narrative	REINHARD, MARGARET P	11/08/10 3:31PM
3 <a href="#">Upload Attachment</a>	<a href="#">cost_share_approval.pdf</a>	Cost Share approva	KUHN MARTIN, TAMARA C	11/09/10 4:17PM

- c. Review the budget to ensure cost sharing proposed is listed.
- d. Check the cost share amount
  - i. Notify supervisor if there are instances of high amounts of cost sharing (ex: 5 to 1 cost sharing to funds being requested)
- e. Check the cost sharing budget for categories which are preferred
  - i. Preferred budget categories are:
    1. UW salary/fringe benefits
    2. F&A costs associated with any cost shared direct expense
    3. Unrecovered F&A costs due to a lowered or waived F&A
    4. Third party cash contributions
  - ii. Acceptable, but not preferred budget categories are:

1. Purchase price of equipment
  2. Travel expenses
  3. Tuition or tuition remission
  4. Supplies
  5. Volunteer Effort
  6. In kind contributions from a third party
- f. Verify that the cost sharing can be documented and add notes in WISPER regarding who will collect the information.
- i. Documentation of payroll CS is obtained by RSP using UW's accounting records.
  - ii. Documentation of non-payroll CS is sent by Dept to RSP, and then RSP enters information into UW's accounting records.
  - iii. Documentation of third-party in kind CS is obtained by Dept and sent to RSP, and then RSP enters information into UW's accounting records.
- g. Act as a partner with campus after the review.
- i. If there are questions or if CS is not clearly documented, contact Dean's office to discuss any issues discovered during review.
    1. If a Dean's office has not submitted a CS tool summary, RSP should encourage the use of this form to document the cost sharing plan and approval.
  - ii. Link to the CS guidelines (pages 7-11 has information on offering CS): [http://www.rsp.wisc.edu/costsharing/costsharing\\_guidance\\_20101021.pdf](http://www.rsp.wisc.edu/costsharing/costsharing_guidance_20101021.pdf)
  - iii. If there are educational opportunities, the team member can set up a meeting with the Dean's office to offer guidance/suggestions for future reference.

**FLOWCHART**

