

Oregon State University – College of Agricultural Sciences
Guidance on Returned Overhead (F&A) Splits for Shared Faculty Positions
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Background: Given our College's and stakeholder's need for trans-disciplinary research and increasing interest of new faculty to work across CAS units and OSU colleges, we increasingly hire new faculty with joint appointments in multiple CAS units and/or OSU Colleges. This document provides guidance to CAS unit leaders on the process for determining and negotiating F&A splits across CAS units and/or OSU colleges.

1. Distribution of returned overhead should be negotiated at the time of hire.
2. Negotiations with OSU colleges (or OSU Research Office) should be done by the Executive Associate Dean, while distributions across CAS units can be done by the unit leaders. Within CAS units, grants must be submitted within the organization code of the faculty member's home unit unless both unit leaders agree to a different organization code prior to grant submission via Cayuse. Any F&A splits between units should be documented via an MOU.
3. Terms should be specified for a five-year period and re-negotiated at five-year intervals.
4. Although there is some flexibility, distribution of returned overhead should consider the criteria used to establish F&A rates by granting agencies, that is, the real cost of doing research. Refer to: https://fa.oregonstate.edu/sites/fa.oregonstate.edu/files/budget/budget_convers/budget-conversations-facilities-and-administrative-costs.pdf. Criteria to be considered include:
 - a. Salary. Consider only the proportion of FTE accounting for research; teaching FTE is covered by the shared responsibility budget model.
 - b. Provision of research space
 - c. Provision of administrative services (to hire staff and students, provide safety programs, manage budgets and administer grants and reporting requirements, etc.)
 - d. Start-up costs (considered for the first ten years of employment)
5. Any plan for distributing returned overhead should be reviewed by AMBC so that the plan can be designed to minimize the administrative burden of the process.