



**Matching Fund Policy (non-seed grants)
IST_FN-13 Administrative Guidelines**

College of Information Sciences and Technology matching support (grants excluding seed grants that are internal to Penn State)

Consistent with Penn State’s approach, matching funds are typically only provided when required by the funding entity. When matching funds are required, the PI should make every effort to take advantage of Penn State’s matching support (<https://www.research.psu.edu/osp/prepare-proposals/develop-budget/cost-sharing-matching>).

If central matching is insufficient, a request for matching funds from the college will be considered. Importantly, faculty involved in the grant may be expected to utilize discretionary funds which are under their control as part or all of the required matching support. When this is the case, this will be made clear in advance and the faculty involved will be expected to confirm their understanding of this requirement. More specifically, when matching funds are approved and the funds will be used in a way that directly benefits a relatively small subset of the faculty, the expectation is that the funding will be provided as follows:

- If the faculty directly involved have discretionary funds that can be used, they will be expected to cover all of the matching expenses, so long as doing so does not use more than 50% of their discretionary funds. Any amount that would exceed 50% of their discretionary funds will be covered by IST. Exactly how each individual will contribute will be defined based on how the matching funds would be used and the amount of discretionary funding each individual has available. Details will be shared with the faculty involved and confirmation will be required prior to proposal submission to ensure everyone understands the expectations.
 - If the faculty directly involved do not have discretionary funds that can be used, the college will provide the resources.
 - Examples of discretionary funds that may be utilized include startup funds, gift funding, salary savings, endowment earnings, etc.
 - Obviously, faculty funds will only be considered if allowed based on any restrictions associated with those funds as well as restrictions associated with the funding being pursued.

The determination of whether a grant “the funds will be used in a way that directly benefits a relatively small subset of the faculty” will be made by the Associate Dean for Research, the Associate Dean for Undergraduate and Graduate Studies, and the Dean. Situations where matching funds are not required will be handled on a case by case basis and will likely require

a larger contribution from the faculty involved if they have discretionary funding available which could be used for matching purposes.

Approved by: Dr. Andrew Sears, Dean 06/28/2021

Revised: Dr. Andrew Sears, Dean 8/16/2021