

F&A Return: When / How / How Much

College of Engineering

When do I get my F&A Return?

F&A return for a given fiscal year (FY) is processed by Campus in February following that FY. In February of calendar year 2024, campus will return F&A for FY23, which ended June 30, 2023. **Please submit your request between September 1 – December 1 of 2023.** See below for how to request return.

How do I get my F&A Return?

- If you have < \$100k in discretionary funds (DF), you don't need to do anything to get your F&A return – it is automatically processed by CoE Fiscal Office and will appear in your Operating Account.
- If you have ≥ \$100k in DF, there is no automatic return of F&A. But you can request return [here](#), and see explanation below in *Why the DF Threshold?*

Why the DF threshold?

Campus returns 20% of collected F&A to colleges to spur spending on research. **If we don't spend it, Campus will pull back 10% of your DF annually.** Accumulating too much DF rather than spending it = don't use it = we lose it.

How and when is my DF threshold (<>\$100k) determined? See [here](#).

How much will I get?

Example: F&A with Shared Credit: Suppose 3 PIs share an NSF research project on MU campus with an award of \$2,769,911 → **F&A = \$1,000,000** (See Figure 1). Their shared credit on the grant is:

- PI #1 (ChBME, COE), Shared Credit = 40%
 - PI #2 (EECS, COE), Shared Credit = 20%
 - PI #3 (Physics, A&S), Shared Credit = 40%
- 80% of F&A (green box) is retained by Campus to support research operations.
 - 20% of F&A (blue box) is distributed by campus to the COE and A&S according to shared credit.
 - COE distributes half their 20% to each COE co-PI according to shared credit (orange boxes).
 - A&S distribution of F&A is handled according to A&S policy.

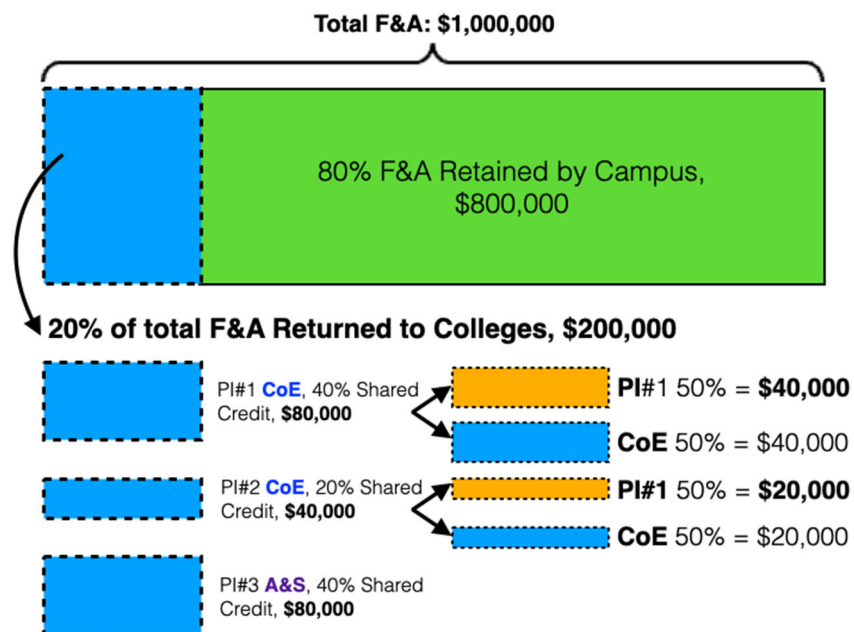


Figure 1: Illustration of F&A sharing for College of Engineering where both COE PIs have < \$100k in DF.