Matching Funds Program Guidelines
AY 2015-2016

INTRODUCTION
The Matching Funds Program Guidelines describes the terms, conditions, and deadlines associated with the Program. All project teams are expected to read and be familiar with this document prior to submitting a proposal and application. Failure to comply with the guidelines and deadlines in this document may lead to ineligibility for the current or future Matching Funds Program and/or require the project team to return funds disbursed.

PURPOSE OF THE JACOBS SCHOOL MATCHING FUNDS PROGRAM
The purpose of the Jacobs School Matching Funds Program is to support project-based teams that are a part of UC San Diego-recognized engineering student organizations and to encourage external fundraising. This is accomplished by providing matching funds that support project team supplies, equipment, and travel. To be eligible, project-based teams must submit their project to a competition, showcase, conference or exhibition where the project will be judged or critiqued and strives to solve a problem using engineering skills.

PROGRAM OVERVIEW
The Matching Funds Program supports project-based teams by matching, dollar-for-dollar, in-kind and financial donations up to the program overall budget limit. For 2015-2016, the budget is $60,000. Award amounts will be based on the quality of the proposal, value of the project and the success in raising matching funds. Additionally, the maximum award to any individual effort is $4,000 per project team submitting to a competition, and $2,000 per project team submitting to a conference or exhibition. In order to be eligible, project teams must

- Be part of a student organization registered with the Center for Student Involvement (CSI),
- Compete against other project teams, or
- Showcase their project at an event where it will be critiqued by others, and
- Submit a completed application by Monday, December 21, 2015 at 2pm.

Project teams awarded funding will receive their allotments in two disbursements, detailed below in the Fund Disbursement Schedule section. Receipts for ALL FUNDING must be submitted with your final report within 20 business days after the competition, conference, or showcase.

Project teams not meeting receipt or report deadlines may be deemed ineligible for future Matching Funds cycles.

2015-2016 PROGRAM TIMELINE
The timeline for this year’s Matching Funds process is outlined below. Note that some dates are still tentative.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event/Deadline</th>
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<tbody>
<tr>
<td>Fri 13 Nov 2015</td>
<td>2015-2016 Matching Funds Program Begins</td>
</tr>
<tr>
<td>Fri 20 Nov 2015</td>
<td>Drop-In Question/Answer Day in IDEA Student Center</td>
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<tr>
<td>Fri 18 Dec 2015</td>
<td>(8:30am – 4:00pm)</td>
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<tr>
<td>Mon 21 Dec 2015</td>
<td>Drop-In Question/Answer Day in IDEA Student Center</td>
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<tr>
<td>Fri 5 Feb 2016</td>
<td>APPLICATIONS/SUPPORTING DOCUMENTS DUE BY 2:00PM VIA</td>
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<tr>
<td>Varies</td>
<td>IDEA STUDENT CENTER WEBSITE</td>
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<tr>
<td></td>
<td>Matching Funds Recipients/Amounts Released</td>
</tr>
<tr>
<td></td>
<td>FINAL REPORT DUE*</td>
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* Final reports are generally due within 20 business days after their competition.

TOTAL FUNDING ELIGIBILITY
The amount of funds available for the program may change annually based on budget constraints. For the 2015-2016 Academic Year, the amount is up to $4,000 per project team, and will be matched on a dollar-for-dollar basis. Additionally, the Matching Funds program does not overfund any projects. If the combination of the amount raised externally and the dollar-for-dollar match exceeds the total project budget, you are only eligible to receive up to the budget amount. For example, if your total project budget is $7,000 and you have raised $4,000 in donations, the maximum you would be eligible for through Matching Funds is $3,000.
MATCHING FUNDS ELIGIBILITY

Both in-kind donations as well as funds that are raised from individual or corporate donors are eligible to be submitted as matched funds, provided they are accompanied with valid supporting documentation as outlined below. TESC funding of organizations is never eligible since this funding is primarily intended for organization operational and administrative costs, not for project teams.

For in-kind and equipment/service donations, project teams must provide a receipt showing the item(s) being donated. If the item was purchased by a donor (including team members), the receipt showing the full purchase price must be provided. For items discounted or donated directly from a company, valid documentation includes a receipt noting the discount (up to 100%) and actual price paid (if any) or, in the case of donations where no receipt is available, a letter on company letterhead clearly indicating the project team name, the item(s) donated, and the original value. Note that donated, discounted, and/or purchased items that have noticeably inflated prices may be adjusted to average retail prices or may be excluded from matching funds calculations at the discretion of the selection committee.

For financial donations, project teams must provide a copy of the check made payable to the organization. Checks should somehow indicate that the money is to be used for the project team, such as a notation in the memo line or an accompanying cover letter. Financial donations should be sponsorship that project teams have taken initiative to seek out and secure such as from local, regional, national, or international firms. Donations from members and their families to the project team are discouraged for inclusion in the proposal; the committee will consider the fundraising efforts of the team in deciding how funds are awarded.

Items submitted for matching that do not have valid supporting documentation will NOT be included in calculations for Matching Funds. If you have questions about supporting documentation, please contact Melinda Beyerle prior to submission.

FUND DISBURSEMENT SCHEDULE

Once Matching Fund decisions are made, a check request for the first allotment of 67% of the amount awarded will be initiated. Check processing may take up to six (6) weeks. After competition or conference is complete, teams have up to 20 days to submit a final report and receipts. After the report is reviewed and approved, the check request for the remaining 33% will be initiated and checks will be available within six weeks. All receipts must be turned in with your final report. Funds that are not accounted for must be returned to the IDEA Student Center.

Project teams not meeting the receipt and report deadline may be deemed ineligible for future Matching Funds cycles.

APPROVED USE OF MATCHING FUNDS

Matching Funds may generally be used for travel to and from the competition, hotel accommodations, project supplies, uniforms, and other directly-related administrative costs such as postage. Matching funds may only be used to support team members who are directly involved in the project. Food, beverage, alcohol, and entertainment costs are never approved uses. Sample approved expenses include:

- Airfare
- Car Rental
- Personal Vehicle Mileage
- Hotel Accommodations
- Project Supplies/Materials
- T-Shirts (up to $300)
- Postage
- Printing Costs

This is not an exhaustive list. If you are unsure if an item qualifies, contact Walter Torrence III prior to purchasing the item(s). Non-approved purchased must be reimbursed by the project team.

SELECTION PROCESS

All proposals and applications are reviewed by the Matching Funds Committee to determine award amounts. Allocations are made based on three main criteria: the quality of the proposal, the project’s technical merit, and fundraising efforts. Keep this in mind as you develop your project, proposal, and fund raising plans/goals.

APPLICATION PROCESS

There are two parts to the application: the Proposal and the Application. The proposal should be completed first and is the more detailed of the two pieces. Use the following guidelines when drafting, refining, and editing your proposal.

Each proposal must include the following items:

- Cover Page – This is the first page of your proposal and should be polished and refined looking. Items to consider are pictures of your project, project team, or previous competitions. Also be sure to include the Project Team name, the
Organization name, what the document is (e.g. Matching Funds Proposal), and other key information. Be creative and professional!

- **Formal Letter Requesting Funds** – This letter should be addressed to the Dean of the School of Engineering from your faculty advisor.

- **Description of Project/Competition** – This is truly the meat of your proposal and where the committee will focus much of its attention. Topics to consider for this section include: project team history/highlights, description of project, benefits to participants, benefits to society, benefits to the engineering field, description of competition, detail of fundraising efforts/methods to date. Proposals are not required to address all of these items, nor are they limited to them – they are suggestions to help you focus your proposal. As this section will likely be the lengthiest, break it into sections and review to make sure it flows coherently and logically. If your project team has previously been awarded Matching Funds, this section should include what you learned previously (as stated in your final report) and how you can incorporate that knowledge into the project this year, as appropriate.

- **Itemized Budget** – Your budget should be a detailed, itemized list of your project’s complete financial picture. It is important for the committee to understand how you will be using any funds, and is also crucial tool to help the project team plan. A thorough, well crafted budget indicates that the project team has taken the time to understand the financial aspect of an engineering project and knows what resources they need to succeed. For example, instead of a line item for that says “Airfare - $3000”, indicate the unit cost and the number of people such as “Airfare: San Diego to Washington DC - $3000 (300 each x 10 members)”. Please see the sample budget on the IDEA Student Center website for more examples.

- **Technical & Professional Polish** – Although this is not an actual piece of the proposal, each section should be drafted and edited to create a finished product that is professionally presentable. Writing should be free of grammar and spelling errors. Technical diagrams and illustrations should use standards and conventions appropriate to your field. The overall layout should look clean and neat. Let both project members and non-members proof your work and provide feedback. In addition to your advisor, ask other faculty members to review it. IDEA Student Center Staff members are also available to provide suggestions on your proposal.

Sample proposals and budgets are available on the IDEA Student Center website. **Electronic submissions of proposals are strongly preferred, in PDF or MS Word format.**

After completing your proposal, you will need to fill out the application. To complete the application, you will need:
- names and e-mails for all active members of your project team
- competition location information
- a list and documentation for all donations of cash, services, and/or equipment
- the final estimate of your total budgeted expenses (from your budget proposal)

**The proposal, application, and supporting financial documents must be submitted to the Matching Funds Online Tool via the IDEA Student Center Website by Monday, December 21, 2015 at 2:00pm. Early submissions are encouraged.**

**Receipt/Documentation Submission**

Receipts and documentation of items purchased/expenses made with Matching Funds dollars should be submitted along with a Matching Funds Expense Log. You will be required to **submit receipts for ALL items purchased** with Matching Funds dollars along with your final report in order to receive your final allotment of funds.

**Final Report**

Similar to the initial proposal, the project team must submit a final report at the conclusion of the competition. This report must adhere to the same professional standards outlined for the proposal. Suggested topics to address in this report are: an overview of the competition results, review of final project/product (including plans for future modifications), lessons learned about engineering concepts, lessons learned about group dynamics, and overall reflections on the project process. In addition, this report must detail the use of any remaining funds not already accounted for in your preliminary expense report.

**The final report is due to the Matching Funds Online Tool via the IDEA Student Center website within 20 business days of your competition.**

**IDEA Student Center Information**

Walter Torrence III in IDEA Student Center can answer any questions you may have about the process. In addition, the IDEA Student Center is where all proposals and applications should be submitted.

- **Location:** EBU1/Jacobs Hall – 1400
- **Hours:** Mon – Fri. | 8:00am – 4:30pm (closed daily 12pm – 1pm)
- **E-Mail:** wtorrence@ucsd.edu | **Web:** http://idea.ucsd.edu/ | **Phone:** 858-822-3778 | **Fax:** 858-822-3903