MATCHING FUNDS

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 for project 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 2016-2017, 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), or
- 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 15, 2016 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.

Teams that do not meet receipt or report deadlines may be deemed ineligible for future Matching Funds.
**2016-2017 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>Day</th>
<th>Month</th>
<th>Year</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fri</td>
<td>11</td>
<td>Nov 2016</td>
<td>2016-2017 Matching Funds Program Begins</td>
</tr>
<tr>
<td>Thurs</td>
<td>17</td>
<td>Nov 2016</td>
<td>Drop-In Question/Answer Day in IDEA Student Center (8:30am – 4:00pm)</td>
</tr>
<tr>
<td>Wed</td>
<td>30</td>
<td>Nov 2016</td>
<td>Drop-In Question/Answer Day in IDEA Student Center (8:30am – 4:00pm)</td>
</tr>
<tr>
<td>Mon</td>
<td>15</td>
<td>Dec 2016</td>
<td>APPLICATIONS &amp; DOCUMENTS DUE BY 2:00PM TO IDEA Center</td>
</tr>
<tr>
<td>Fri</td>
<td>3</td>
<td>Feb 2016</td>
<td>Matching Funds Recipients Notified and 2/3 Funds Issued</td>
</tr>
<tr>
<td>Varies</td>
<td></td>
<td></td>
<td>FINAL REPORT DUE* - 20 days after competition/conference date</td>
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* Final reports are 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 2016-2017 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.

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 your Student Life Coordinator 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 four (4) 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 your Student Life Coordinator 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 fundraising 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:

THE PROPOSAL

• **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** – Topics to include in this section are:
  1. Project team goals and vision for the year
  2. Address previous year’s **Lessons Learned** and detail improvement (if applicable)
  3. Description of project with photos, diagrams, and website or social media links
  4. Benefits to participants, benefits to society, and benefits to the engineering field
  5. Description of competition/conference/project with dates
  6. Detail of fundraising efforts and methods (sponsorship deck, email, crowdfunding, etc.) 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. 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, and organized 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;

| Receipt #2 | Airfare: San Diego – Denver ($300x10 members) | $3000.00 |

Format expenses as a table and indicate the corresponding numbered receipt with details of the costs. 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.

Electronic submissions of proposals are strongly preferred, in PDF or MS Word format.
THE APPLICATION
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; dates, location, & costs
- A list and electronic versions of documentation for all donations of cash, services, and/or equipment
- The final estimate of your total projected budgeted expenses (from your budget proposal)

The proposal, application, and supporting financial documents must be submitted to the IDEA Student Center online by Thursday, December 15th, 2016 at 2:00pm. Early submissions are highly encouraged and most welcome!

http://jacobsschool.ucsd.edu/idea/resources/matching_funds.shtml

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. Content that must be included in this report are:

1. An overview of the competition results
2. Review of final project/product (including plans for future modifications);
3. And lessons learned about engineering concepts
4. Lessons learned about group dynamics;
5. 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.

Make sure to notify your Student Life Coordinator of the date for your competition, conference, or project completion. The final report is due to the IDEA Student Center within 20 business.

IDEA STUDENT CENTER INFORMATION
Your Student Life Coordinator 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: smoise@ucsd.edu | Web: http://idea.ucsd.edu | Phone: 858-822-3778 |