MATCHING FUNDS

PROGRAM GUIDELINES

# **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 encourage external fundraising among diversity student organizations and project-based teams that are part of UC San Diego-recognized engineering student organizations. The Matching Funds Program matches external funds raised to provide financial support for project teams’ project supplies and equipment, and to encourage diversity organizations’ attendance to national conferences for professional development. 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. Note that funding is not provided for costs associated with hosting events/competitions, including hackathons. In addition, funding is not provided for travel-related costs. We encourage project teams to apply to Associate Students for funding through their Tournament and Competition Funds to cover their travel related expenses.

## **PROGRAM OVERVIEW**

The Matching Funds Program supports diversity organizations and project-based teams by matching, dollar-for-dollar, in-kind and financial donations up to the program overall budget limit. 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 typically $4,000 per team submitting to a competition, conference or exhibition, though larger awards are *occasionally* available for teams with high-budget projects who raise sufficient matching funds. In order to be eligible, project teams and diversity organizations must:

* Be part of a student organization registered with the Center for Student Involvement (CSI), and
* Be a diversity organization seeking funds for professional development or
* Be a project team participating in a competition, and
* Submit a completed application by the deadline for either Spring or Fall Cycle

Project teams and diversity organizations 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. Students who receive Matching Funds are not eligible for Student Travel Funds within the same academic year.

Starting Fall 2021, all student organizations must have an approved EDI Plan in order to be eligible for Matching Funds.

## **TOTAL FUNDING ELIGIBILITY**

The amount of funds available for the program may change annually based on budget constraints. 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.

## **Eligible Funding**

1. In-kind donations & 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: 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.
2. Financial donations Project teams must provide a copy of the check made payable to the organization.
	* Checks should 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.

**Items submitted for matching that do not have valid supporting documentation will NOT be included in calculations for Matching Funds.**

**Not Eligible**

* TESC & Engineering Department/Student Organization Funding
* Donations from student organization members and their families
* Crowdfunding Sources such as GoFundMe, etc.

If you have questions about supporting documentation, of whether your donation is eligible, please contact the IDEA Engineering Student Center.

## **APPLICATION PROCESS**

To apply for matching funds, you will submit the following information and documents via the online application link found….

* Names and emails for all active members of your project team
* Supporting documents for donations raised
* The final estimate of your total budgeted expenses, from your itemized budget.
* The proposal document as described below
* Most recent approved EDI Plan
* Name and email of the organizations Fund Manager

## **The Proposal**

The proposal should be completed first and is the more detailed of the two pieces. Use the guidelines below when drafting, refining, and editing your proposal. **Proposals must follow the structure listed below and be no more than 2-3 pages.**

## ***Proposal Guidelines* *(2-3 Pages)***

Each proposal must include the following items in this order:

* **Cover Page** *(1 Page - not included in total page count)*
	+ Must include Project Team name, Organization name, and what the document is (e.g. Matching Funds Proposal), picture of project and (if available) group picture of members.
* **Student Organization History** (*1 Paragraph)*
* **Description of Competition (or Conference for Diversity Organization)** (*1 Paragraph)*
* **Description/Overview of Project** *(2-3 paragraphs)*
	+ Include a brief project timeline.
	+ 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 this year’ project, as appropriate.
* **Outreach plan in community or on-campus** (*1-2 Paragraph)*
	+ Include your organization’s diversity efforts and contributions to the UC San Diego community.
	+ Outline the benefits your organization is providing to members and participants.
* **Benefits of attending competition or conference to organizations members** (*1 Paragraph)*
* **Itemized Budget**
	+ Review “Approved use of Matching Funds” section below when drafting your budget.
	+ Your budget should be an itemized list of your project’s or organization’s complete financial picture. Please see the sample budget on the IDEA Engineering Student Center website for more examples.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item Name** | **Description** | **Cost Per Item** |  **Quantity**  | **Total Cost**  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |
| --- | --- |
| **Grand Total**  |  |

* + **Note:** If your competition takes place in the summer, AS Funding will not be an available source of funds for your travel related expenses. Please note this in your Matching Funds Application and include travel costs in your itemized budget. The selection committee will take this into consideration when reviewing your proposal.
* **Summary of Funding Raised**
	+ Provide an itemized list of all eligible funding raised, using the format provided below.
	+ Provide copies of supporting documents that correspond to each donation raised (e.g., check, email outlining donation provided, etc.) through the online application.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Donor Name** | **Donation Type** | **In-Kind Donation Type** | **Amount** | **Date Received** | **Supporting Document Type** |
| MatterHackers | In-Kind | Software Program | $400 |  | Email communication  |
| Northrup Grumman | Financial |  | $150.00 | January 1, 2020 | Check  |

* **Formal Letter Requesting Funds** *(1 Page - not included in total page count)*
	+ This letter should be addressed to the Dean of the School of Engineering from your faculty advisor.

**All proposals should be professional and free of grammar and spelling errors.** Once complete, proposals should be submitted online through the Application and Proposal Submission link, which can be found on the Matching Funds website.

## **Submitting the Application**

The proposal, project information, EDI Plan and supporting financial documents must be submitted to the IDEA Engineering Student Center via the submission link located on the Matching Funds website by the deadline for either Spring or Fall Cycle. **No late applications will be considered.**

## **FINAL REPORT PROCESS**

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. Final Reports should be submitted using the Final Report Submission link, which can be found on the Matching Funds website.The final report is due to the IDEA Engineering Student Center within 20 business days of your competition.

Each Final Report must include the following items in this order:

* An overview of the competition results *(1-2 Paragraphs)*
* Review of final project/product (including plans for future modifications) *(2-3 Paragraphs)*
* Lessons learned about engineering concepts, lessons learned about group dynamics, and overall reflections on the project proces*s (2 Paragraphs)*
* Detailed use of funds not already accounted for in the itemized budget from the proposal that was submitted with the application
* Clear group pictures/images of those in attendance at competition or conference
* Receipt/Document 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 ⅓ allotment of funds.

## **APPROVED USE OF MATCHING FUNDS**

**Project Teams**

Matching Funds may be used for competition registration, project supplies/materials and other directly-related administrative costs. Matching funds may only be used to support team members who are directly involved in the project. This is not an exhaustive list. If you are unsure if an item qualifies, contact the Program Coordinator prior to purchasing the item(s). Non-approved purchases such as those related to travel must be reimbursed by the project team.

Note that funding is not provided for costs associated with hosting events/competitions, including hackathons. In addition, funding is not provided for travel-related costs. We encourage project teams to apply to Associate Students for funding through their Tournament and Competition Funds to cover their travel related expenses.

## **Diversity Organizations**

Matching Funds may generally be used for travel to and from the conference and hotel accommodations. Sample approved expenses include:

* Airfare
* Conference Registration
* Car Rental
* Hotel Accommodations

**NOTE: Food, beverage, alcohol, and entertainment costs are never approved uses.**

## **FUND DISBURSEMENT SCHEDULE**

Once a student organization receives notice of amount awarded, Matching Funds will be distributed to a student organizations on-campus account through a transfer. Funds will be access through their organizations Fund Manager with their home department:

1. First allotment of 67% or ⅔ of the amount awarded will be initiated.
2. 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% or ⅓ will be initiated. All receipts must be turned in with your final report. Funds that are not accounted for must be returned to the IDEA Engineering Student Center. Project teams and diversity organizations not meeting the receipt and report deadline may be deemed ineligible for future Matching Funds cycles.

**NOTE: Funds Transfer may take up to 4-6 weeks.**

## **IDEA ENGINEERING STUDENT CENTER INFORMATION**

Your Program Coordinator at the IDEA Engineering Student Center can answer any questions you may have about the Matching Funds Program Guidelines.

Location: Jacobs Hall (EBU1) 1400

Hours: Mon – Fri | 8:00am – 4:30pm

E-Mail: idea@eng.ucsd.edu

Phone: 858-534-6105

Web: http://idea.ucsd.edu/