

## **GRANT-MATCHING SUPPORT PRACTICES CAL POLY**

In order to provide incentives to faculty to secure peer-reviewed funding for their own scholarship, as well as for programs that fund institutional initiatives such as curriculum development and facilities enhancement, the University may provide matching funds for the following types of grants.

### **Grants Requiring Institutional Match**

The University will normally provide required grant matching when all of the following conditions are met:

1. The grant is from an agency/sponsor that requires peer review of grant proposals.
2. The granting agency/sponsor requires an institutional match.
3. The cost of matching is justified by the benefit to the institution and the fit with college and University strategic planning objectives.
4. The college/department has made a commitment to provide at least one half of the required match.
5. If the Office of Academic Affairs has agreed to participate in the match, and the grant proposal has been reviewed and signed by that office prior to submission.

The Office of Academic Affairs will only provide support in exceptional cases, in which an award is expected to have a major University-wide impact.

**NOTE:** If the Provost's Office indicates on the PAF that its commitment will be confirmed at some time in the future, the colleges will be responsible for obtaining that confirmation OR will assume responsibility for the entire matching commitment if the proposal is successful and an award is made.

### **Grants for Which Institutional Match is Desirable**

The colleges/departments may provide matching support for grants even though the match is not required. Usually this will occur when all the following conditions are met:

1. The grant is from an agency/sponsor that requires peer review of grant proposals.
2. The institutional match increases the chance of the award being made.
3. The cost of matching is justified by the benefit to the institution and the fit with college and University strategic planning objectives.
4. The college/department has made a commitment to provide the proposed match.
5. The grant proposal has been reviewed and signed by the Department Head and Dean prior to submission of the grant proposal.

# GRANT-MATCHING REQUEST FORM

Grant-matching by the University is not automatically assured. The attached criteria will help the University determine whether the cost of the match is justified by the benefits. This Grant-Matching Request Form (GMRF) should be submitted as early as possible, to permit adequate discussion and evaluation of the request. Ideally this should occur before work begins on the proposal, **but no later than 10 working days prior to the proposal due date**. Revisions may be made to the final proposal by attaching a new GMRF to the original one with approval signatures, and circulating these with the final Proposal Approval Form (PAF).

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Project Director (PD): \_\_\_\_\_ Rank/Title: \_\_\_\_\_

College: \_\_\_\_\_ Department: \_\_\_\_\_

Title of Proposal: \_\_\_\_\_

Proposal Deadline: \_\_\_\_\_ Granting Agency: \_\_\_\_\_ Proposed Start Date: \_\_\_\_\_

Total estimated funds requested from the Sponsor: \$ \_\_\_\_\_

Is match required by the granting agency?  Yes  No

Level of match required by granting agency: \_\_\_\_\_

Abstract of proposed work and benefit to the University. Please include in the narrative all participating faculty from other department(s). (Limit to 200 words):

**Amount of Cal Poly Matching Requested (estimate):**

**Assigned Time\***

| List Faculty and Department(s)                                       | Yr. 1<br>(In WTU's) | Yr. 2<br>(In WTU's) | Yr. 3<br>(In WTU's) | Yr. 4<br>(In WTU's) | Yr. 5<br>(In WTU's) |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|
|  |                     |                     |                     |                     |                     |
|  |                     |                     |                     |                     |                     |
|  |                     |                     |                     |                     |                     |
| TOTAL WTU's  |                     |                     |                     |                     |                     |
| Matching funds requested for equipment.                              | \$                  | \$                  | \$                  | \$                  | \$                  |
| Matching funds requested for other expenses including student/staff. | \$                  | \$                  | \$                  | \$                  | \$                  |

NOTE: WTU = Weighted Teaching Unit

\* If assigned time is requested, will an equivalent amount of released time be requested in the proposal?  Yes  No

Will added compensation be requested in the proposal? Academic Year  Yes  No Summer Salary  Yes  No  
(If academic year, note below the name of the recipient and the number of hours for each year of the grant period.)

Have matching funds been requested on any pending proposals? (If yes, please attach a copy of the PAF for each proposal.)  Yes  No

Are you currently receiving matching funds on any grants? (If yes, attach the PAF from the grant proposal(s).)  Yes  No

Will there be any third-party matching (external match) or deep discounts? (If yes, please describe below briefly.)  Yes  No

**Explanation:**

(If more space is needed use the back of this sheet.)

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**APPROVALS:**

All applicable signatures must be obtained by the Project Director if matching funds are requested by more than one department or college.

**College/Unit (cost-share participants please approve project, dollar amount, and/or WTU's by signing below)**

| College/Unit  | Date  | \$ Amount Approved * | WTU's Approved |
|---|-------|----------------------|----------------|
| Department Head (P.D.'s department)                 | _____ | \$ _____             | _____          |
| Department Head (other participating department)    | _____ | \$ _____             | _____          |
| Department Head (other participating department)    | _____ | \$ _____             | _____          |
| Department Head (other participating department)    | _____ | \$ _____             | _____          |
| Dean/Director (P.D.'s college/unit)                 | _____ | \$ _____             | _____          |
| Dean/Director (other participating college/unit)    | _____ | \$ _____             | _____          |
| Dean/Director (other participating college/unit)    | _____ | \$ _____             | _____          |
| Dean/Director (other participating college/unit)    | _____ | \$ _____             | _____          |
| Assistant Vice Provost Systems Resource Management* | _____ | \$ _____             | _____          |

\* excluding WTU's

(\*Signature needed only if matching has been agreed to by the Office of Academic Affairs)

**Please return form to Grants Development Office when completed. It will circulate with the PAF and proposal.**