



Matching Requirements

Overview and Tips



Agenda

- Clarify match requirements
- Review match progress tracking
- Discuss compliance expectations
- Share tips and suggestions
- Puzzle activity

Requirements



- All EIR grantees must provide a match of 10% of funds
- Basis of calculation: expended funds

	EIR Award Amount	Amount Expended by End of Project Period	Match Required
Example 1	\$4,000,000	\$4,000,000	\$400,000
Example 2	\$8,000,000	\$7,900,000	\$790,000
Example 3	\$15,000,000	\$14,000,000	\$1,400,000

- Exceeding match is allowed and encouraged
- Timeline: project end date, as revised by any approved no-cost extensions



Sources

- Private business and donors
- Local charitable and service organizations
- Regional and national foundations
- Local educational agencies
- Federal funds (program statute must explicitly permit use for match)

Grantee Tip:
Make sure to look at foundation grants for support and document their approval for such use through a letter.

Types



Cash

- Form: a few large donations or multiple small donations
- Purpose: for general project activities or a specific project activity

In-kind

- Form: volunteer/services, donated supplies/equipment, discounted rates
- Purpose: to support project activity
- Note: discounted rates must be specific to the grant and not ordinary cost of business or a discount available to others outside of the grant

Grantee Tip:
Consider how to use existing funds from other sources that provide in-kind support for programmatic development or research efforts.



Use of Funds

- Must be used to carry out activities supported by the grant
- Can be used across budget categories (personnel, fringe, travel, equipment, supplies)
- Must be consistent with [cost principles \(2 CFR 200 Subpart E\)](#):
Allowable, Allocable, Reasonable, Necessary



Indirect Costs

Grantees may NOT use unrecovered indirect costs as match

U.S. DEPARTMENT OF EDUCATION BUDGET INFORMATION NON-CONSTRUCTION PROGRAMS		OMB Control Number: 1894-0008 Expiration Date: 09/30/2023						
Name of Applicant Organization		Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.						
SECTION A - BUDGET SUMMARY U.S. DEPARTMENT OF EDUCATION FUNDS								
Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel								
2. Fringe Benefits								
3. Travel								
4. Equipment								
5. Supplies								
6. Contractual								
7. Construction								
8. Other								
9. Total Direct Costs (lines 1-8)								
10. Indirect Costs *Enter Rate Applied:								
11. Training Stipends								
12. Total Costs (lines 9-11)								

Grantees cannot charge 0 on line 10 of their federal expenditures and count the "in lieu" of indirect towards match.



Indirect Costs

Match budget from an organization CAN include a line item for indirect costs.

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Grantees can have indirect costs in their non-federal expenditures in accordance with that third-party organization's approved federally-negotiated indirect cost rate ([2 CFR 200.306f](#))



Indirect Costs Example

- Unrecovered Cost Example – 20% indirect cost rate

Federal Request	Cost share/Match
\$100,000 Total direct costs	
\$0 charged for indirect cost (but could have charged \$20,000)	\$20,000 indirect cost (They decided to pay for it using other monies and not federal dollars, thus putting it here.)

- Indirect costs as a part of cost share.

Federal Request	Cost share/Match
\$100,000 Total direct costs	\$50,000 total cost share items
\$20,000 indirect on total direct costs	\$10,000 indirect on the cost share
\$120,000 Total	\$60,000 Total



Breakout

Putting Together the Pieces of the Match

Instructions: Form groups of 4. (Listen for directions)
Share your response to the corresponding question.
As each group member shares, connect your pieces.

1. What sources did you use for your Year 1 match?
2. What types of match are you anticipating (in-kind, cash)?
3. What kinds of project activities do you plan to support with matching funds?
4. What is your strategy for identifying remaining match?

