



The Andrew W. Mellon Foundation: Matching Funds Request Form

If your grant requires that matching funds be raised, please submit the **Matching Funds Request Form** in order for the Foundation to release the corresponding grant funds.

REPORTS
To Submit
To Edit
Submitted
Accepted

Sample Portal Organization
 G-1804-05663 | \$100,000.00
 Higher Education and Scholarship in the Humanities
 Grant
 Matching Funds Request Form | Due: 12/31/2018
 New / Pending Submission

To complete the **Matching Funds Request** form, navigate to the **Reports > To Submit** section of the Foundation's Fluxx grantee portal.

Select the **Matching Funds Request** form from the list for the appropriate grant. Note the grant number at the top, and the report type and due date at the bottom of the report description.

The **▼ Grant Information** fields at the top of the form display read-only information about the match from the proposal record.

The **Match Details** fields that follow are also read only. They include:

Match Amount (Mellon):	\$100,000.00	<i>Amount of grant funds subject to matching condition</i>
Amount to be Raised (Grantee):	\$200,000.00	<i>Amount to be raised by the grantee to match Mellon's contribution</i>
Payment Threshold:	\$100,000.00	<i>Minimum grant funds to be released upon raising corresponding matching funds</i>
Match to be Completed By:	12/31/2018	<i>Date by which matching funds should be raised</i>
Authority to Designate:	Appropriate Officer	<i>Grantee representative who designates funds to the match</i>
Purpose of Matching Funds:	to achieve the aims of the proposed project. <i>Required purpose for which matching funds are designated</i>	

Contributions of \$5,000 or more

To evidence contributions of \$5,000 or more, the Foundation requires:

- Copies of all canceled checks, bank statements showing wire transfers or receipt of credit card payments, and brokerage statements or signed documentation verifying the transfer of securities and their market value.
- Clear evidence that a donor's intent is to meet the Foundation's match, either by the donor's indication on the check, a letter from the donor to the grantee demonstrating such intent or, in the case of an unrestricted donation, a designation from the grantee's governing board or a senior official that the donation has been appropriately restricted to meet the Foundation's matching requirements.

Please provide a PDF of the required documentation described above.

Evidence of Donations \$5,000 or More

For **Contributions of \$5,000 or more**, please provide:

- **Copies of documentation** verifying the receipt of funds and
- **Evidence of the donor's intent**

Upload documents by clicking on the blue plus icon. Please see the [Working with Documents Guide](#) for more information.

Click the "+" icon to add a donation.

Donation

Add a Donation

Donor

Donation Amount

Payment Date

Total Donations of \$5,000 or more: \$0.00

After adding each of the contributions, the **Total** for all donations of \$5,000 or more will appear here.

Add the name of the **Donor**, the **Donation Amount**, and the **Payment Date** for each contribution of \$5,000 or more.



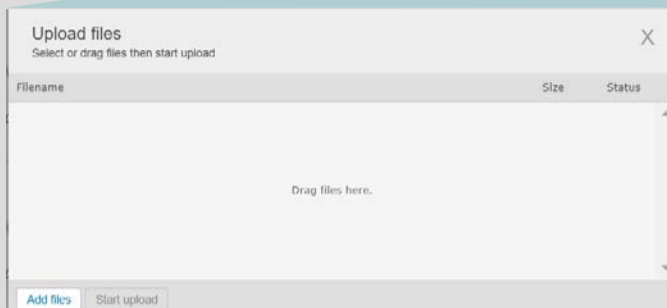
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Contributions Under \$5,000

To evidence donations under \$5,000, please provide a list of all such donations in a single PDF. The list should include the name of each donor and the form, date, and amount of each donation, with a signed statement from a senior authorized official that restricts all listed donations to be used pursuant to the terms of the Foundation's matching grant. With this documentation, the Foundation does not require canceled checks, demonstration of wire or credit card payment, or separate documentation verifying the transfer of securities.

Please provide a PDF of the required documentation described above.
Evidence of Donations Under \$5,000

As above, please see the [Working with Documents Guide](#) for more information about adding documents.



For **Contributions under \$5,000**, please provide a list of all such donations that includes:

- The **Name** of each donor
- The **Form** of payment (cash, check, credit, securities, etc.)
- The **Date** of each donation
- The **Amount** of each donation
- A **Signed statement** from an authorized official that indicates that all listed donations have been restricted to the purposes of the match

(Please note that additional forms of documentation are not required.)

Total Donations Under \$5,000

Please enter the **Total** for all donations under \$5,000 in the field provided.

Match Request Summary

Match Request Summary

Total of all Donations Received: \$0.00

Eligible Foundation Match: \$0.00

These fields are autopopulated based on the entries in the sections above.

Amount Requested from Foundation

Documents

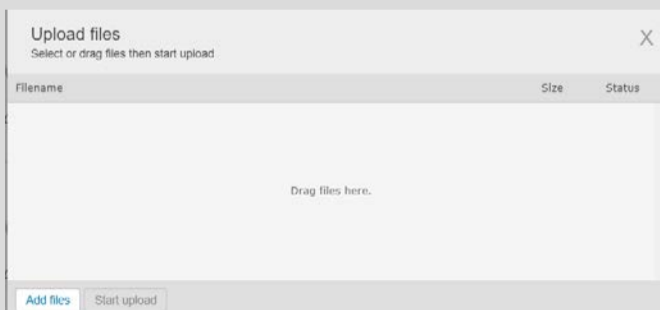
When uploading documents, please select the Document Type that you feel is the most appropriate. Instructions for working with Documents can be found on the [Foundation's website](#).

Total of all Donations Received:
Sum of total donations of \$5,000 or more, plus total donations of less than \$5,000.

Eligible Foundation Match:
Amount of matching funds eligible for release by the Foundation

Amount Requested from Foundation:

Here, please enter the amount of matching funds requested for release by the Foundation. This may equal the **Eligible Foundation Match** listed above, or may be less depending on your organization's specific request.



If you need to add additional documents to your request, you can do so here.

To submit the form, select **Save** and then **Submit**.

Cancel

Save

Submit

For technical support, please contact fluxusers@mellon.org or (212) 500-2484, Mon-Fri, 9:00am-5:30pm ET