

MSU-BOZEMAN DEVELOPMENT COMMITTEE

PROPOSAL SUBMISSION REQUEST – Corporations and Foundations

Montana State University-Bozeman can help facilitate your requests for funding programs and specific projects. This form is designed to help speed the process requiring proposal approval from the MSU Development Committee before a formal submission of a request for \$5,000 or more is made to any company or foundation. In addition, this procedure will assist in confirming that the proposal meets the exact guidelines as set forth by each sponsor, assuring that your proposal receives the full consideration of the sponsor.

This procedure is required for all philanthropic corporate and foundation proposals of \$5,000 or more prior to submittal by any employee of MSU-Bozeman or any entity under the auspices of MSU. It indicates to the prospect that the University has officially approved the proposal.

Return form and direct questions to:

MSU Foundation, Attn.: MSU Development Committee, 1501 S. 11th Ave., Bozeman, MT 59717 Phone: (406) 994-2053

PLEASE PRINT CLEARLY

Name of submitter: _____ Phone: _____
 Project: _____ Department: _____
 Amount Requested: _____ Purpose: _____ Support Type: _____
(endowment, capital, operating) (cash, gift-in-kind)

Attachment (request will not be processed without an attachment): One page summary Proposal rough draft
Note: A copy of the complete final proposal packet is **required** at the time of submission to the funding source. Send the final copy to the MSU Foundation, Attn.: MSU Development Committee.

Exact name of funding source: _____
 Contact Name and Title: _____
 Address: _____ City, State & Zip: _____
 Postmark Deadline: _____

What type of organization is the funding source?: Corporate Corporate Foundation Private Foundation
 Community Foundation Family Foundation

Any previous contact with this sponsor?: No Yes
 If yes, please describe: _____

If successful, will this request require matching cost sharing by MSU?: No Yes
 If yes, where will funding originate and what will be the time commitment? _____

If successful, will there be a commitment of space required for the project?: No Yes
 If yes, who guaranteed the space and what will be the associated costs, if any? _____

It is the responsibility of the applicant to:

1. Keep the MSU Development Committee and the MSU Foundation informed of the progress of its submission and the outcome of the proposal.
2. Within 6 months of submission approval, develop and submit a final proposal.
3. Attempt not to postpone a submission which may prevent others from approaching the same funding source.

Required signatures:

_____/_____/_____
submitter signature date

_____/_____/_____
department head (or equivalent) signature date

_____/_____/_____
dean (or equivalent) signature date

FINAL APPROVAL:

Final approval of the proposal is usually automatic if:

- There are no restrictions placed by the sponsor on the number of proposals submitted by one institution at any given time.
- The sponsor has not been designated previously by the institution for cultivation with regard to a specific proposal/enterprise.
- There is no conflict of interest between two or more proposals for the same sponsor.
- There is no conflict or interference with any proposal already submitted by this institution that is currently under consideration by the sponsor.

If any of the above conditions are present, the MSU Development Committee will review the proposal and make a final decision on the action that should be followed. **A MINIMUM OF FIVE (5) WORKING DAYS IS REQUIRED FOR REVIEW AND PROCESSING.**

Committee

Date received

Date reviewed

Proposal submission request is: Approved Declined Contingency

Preparing Philanthropic Corporate & Foundation Proposals

A Step-By-Step Guide

- Determine if your project is either a grants and contracts project or a philanthropic project. If it is a grants and contracts related project, you must contact the Office of Research and Creative Activities. If your project is philanthropic in nature, then you must contact the MSU Foundation. If you have trouble determining the nature of your project and where to coordinate your efforts, call either the Office of Research and Creative Activities (994-2891) or the MSU Foundation (994-2053).

If your project is qualified as a philanthropic effort, the following steps will help you through the process of obtaining funding:

- Obtain the corporation's or foundation's most recent annual report and application guidelines. They should be available at the Renne Library, the Bozeman Public Library, the World Wide Web, in the Office of Research and Creative Activities or at the MSU Foundation.
- Read these guidelines carefully to determine if your project falls within their funding priorities.
- If your project is within funding guidelines and you would like to pursue the funding source:
- Notify the MSU Development Committee of your intent and complete the *MSU-Bozeman Development Committee Proposal Submission Request* form. **This form must be completed for every proposal of \$5,000 or more submitted to a corporation or foundation on behalf of MSU-Bozeman.** Call the MSU Foundation for more information.
 - After contacting the MSU Development Committee, make contact with someone at the corporation or foundation. Most foundations have program officers available to answer questions and offer advice. Or, if appropriate, write a letter of inquiry to the corporation or foundation. *Copy the MSU Foundation (c/o MSU Development Committee) on all correspondence.*
 - Talk with your dean, or other individuals who may know anyone on the "inside".
- Submit your *MSU-Bozeman Development Committee Proposal Submission Request* form and proposal rough draft or one page summary to the MSU Foundation (Attn: MSU Development Committee). Allow at least *five (5)* working days for the review and processing of the request.
- Prepare the proposal and follow the funding source's guidelines **exactly**. Some guidelines may require any or all of the following and may be found at the MSU Foundation:
- Amount requested.
 - List of current funding sources.
 - Current year's operating budget and/or program budget.
 - List of board members.
 - Proof of tax-exempt status.
 - Purpose for which funds are sought.
 - Recently audited financial statement.
 - Current annual report.
 - Brief statement of history and accomplishments.
 - Most recent IRS form 990.
- If the funding source requires proof of tax-exempt status or an IRS form 990, you must contact the MSU Foundation for the appropriate documentation. Any proposal, regardless of the amount requested, which is submitted in the name of the MSU Foundation or necessitates the use of the MSU Foundation tax-exempt status or IRS form 990 *requires* prior proposal review and approval by the MSU Foundation.
- On all proposals, proofread and re-check supporting data on all facts and statistics cited. Have it reviewed by your department head, dean or anyone else directly involved with the project.
- Copies of the completed proposal are *required* to be filed at the MSU Foundation for any request over \$5,000. Mail the proposal, return receipt is recommended.

- When you receive a response, notify the MSU Development Committee (MSU Foundation, Attn.: MSU Development Committee).
- Send the required periodic up-dates and final reports to the funding source. *Copy the MSU Foundation (c/o MSU Development Committee) with such up-dates.* If there is no indication the required up-dates have been provided, the probability of the MSU Development Committee approving future approaches to the same funding source by the same principal will be significantly reduced.

BEST OF LUCK!