



Office of Corporate and Foundation Relations Clearance Request Form Instructions

The purpose of a Prospect Clearance Policy is to optimize MSU's fundraising efforts by ensuring that solicitations are made to donors that will ensure the most appropriate match of donor interests and University priorities, and maximize their giving to the University. A series of uncoordinated solicitations to the same donor by different individuals in a single institution is the most undermining threat to successful fundraising. The Prospect Clearance Policy protects against this problem.

All corporate and foundation solicitations over \$25,000 must be cleared by the MSU Foundation CFR Office. All other requests (\$25,000 and below) will also be routed through the MSU Foundation following the same process, although, clearance is not necessary to proceed.

Requests to solicit a corporation or a foundation should be made on the attached Clearance Request Form and forwarded to the Corporate and Foundation Office via email or campus mail. Applicants soliciting for \$25,000+ will be notified of the clearance decision within one week of receipt of the clearance form.

Clearance will, in most cases, be granted for six months from the date of approval. Applicants who disagree with the decisions of the CFR Clearance decision can appeal to the President and CEO of the Foundation if necessary.

CLEARANCE PROCEDURE

1. Applicant must submit completed clearance request form, as well as the funder's giving guidelines prior to completion of proposal.
2. Once clearance is received, the applicant is responsible for preparing the proposal and/or Letter of Inquiry.
3. Upon completion, all proposal documentation (letter of inquiry, proposal, project budget, cv's, etc.) should be submitted to the Director for Corporate and Foundation Relations - electronic submission is preferable. This copy should serve as the final, completed version. Should any questions and/or concerns arise upon final review, the Director of Corporate and Foundation Relations will contact the applicant.
4. The Office of Corporate and Foundation Relations will finalize the proposal (501(c)3 letter; organizational budget; cover letter) and will mail the proposal. A copy of the full proposal, will be sent to the applicant and the corresponding unit development officer, if applicable.

Violation of Prospect Clearance. As noted before, the most undermining event in fundraising is uncoordinated approaches to the same corporation or foundation. Equally difficult are those situations in which we continually solicit a donor for a project in which there is little interest or affinity. Because the purpose of corporate and foundation clearance process is to eliminate this difficulty, identified violations of prospect clearance will be reviewed and forwarded to the President and Chief Executive Officer of the MSU Foundation and the President of the University for further action.