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Web: <http://www.collinsmedicaltrust.org/>
Email: CMT@collinsmedicaltrust.org

Policies and Procedures

The **Collins Medical Trust** was established in 1956 by Truman W. Collins Sr. as a tax-exempt charitable trust under the laws of the State of Oregon. It is recognized by the Internal Revenue Service as tax-exempt under Section 501(c)(3) of the Internal Revenue Code and has been classified as a private foundation under Section 509(a) of the Code. The Trust is directed by a Board of Trustees.

Policies:

Given the founding documents of the trust and a knowledge of the intent of the Trustor, Mr. Collins, as well as applicable laws, the Trustees over the ensuing years have established the following general guidelines under which grant requests are considered:

- 1) Disbursements are made only to organizations that have established their tax-exempt status with the U.S. Treasury Department and are operated exclusively for scientific and/or educational purposes.
- 2) Organizations that are committed to equal opportunity for all persons regardless of race, color, national origin, religion, sex, sexual orientation and gender identity, age, disability, or any other legally protected status.
- 3) Preference is given to projects conducted by qualified organizations within Oregon.
- 4) We value and fund a range of health-related research, including basic laboratory science, clinical research, and public health investigations. In addition, we make limited grants for health professions education.
- 5) Early career investigators (e.g., postdoctoral fellows and assistant professors) with salary support from their departments will be prioritized. They must be proposing projects that position them for future funding and must be clearly supported by their mentor(s).
- 6) The maximum funding for research grants is \$30,000.
- 7) Funds cannot be paid directly to or for the benefit of any specific individual. This does not preclude grants to qualified institutions for organized scholarship programs.
- 8) Disbursements are normally not made to “Private Foundations” as defined in the Internal Revenue Code
- 9) The Trust does not support efforts to influence legislation or other political action.
- 10) In considering projects involving substantial funds, the Trust expects the applicant to explain what additional funds constitute the balance for the total amount.
- 11) Research involving human subjects, animals or recombinant DNA must be approved by the appropriate institutional review board (IRB/IACUC/IBC). Investigators are encouraged to have this approval in process or completed at the time of application. No funds will be distributed until IRB/IACUC/IBC approval is obtained; although awards are made, the actual spending only commences upon approval of the relevant institutional review board.
- 12) Funds cannot be used for overhead or indirect expenses associated with the research project.

Submission Procedures

Requests for information and applications for grants from the Collins Medical Trust should be presented in writing. Write for reviewers from the general sciences. Do not assume reviewers are technical experts in your scientific field.

Grant applications should contain the following sections. While there is no page limit, applications should be both sufficiently detailed and concise.

Executive Summary: Introduction, project aims and methods, expected outcomes, plans for subsequent grant applications to extend the work, mentor involvement, and alphabetical list of acronyms used in the proposal.

Body of the Application:

- Introduction
- Background
- Project description (overview, specific aims, methods, analysis, and timelines)
- Limitations, potential pitfalls, and alternatives
- Project significance
- Plans for future funding
- Investigator background and experience
- Anticipated support from mentor(s)
- IRB/IACUC approval or status
- Budget and budget justification (maximum \$30,000 for direct costs, not to include PI salary, indirect, or overhead expenses. If total funds of a project exceed the limit, explain the source of the balance)
- References
- Biosketches of investigator(s) and mentor(s) (NIH format preferred)
- Letters of support (e.g., mentor(s), department chair). For MD investigators, protected time for research should be explicit. For all investigators, mentor letter should: a) comment on the feasibility of the investigator's methods in the proposed study, and b) state what time and resources the mentor will provide to support the investigator. Department chair or mentor letters should specifically indicate support for the PI's salary.

Additional Clarifying Information:

- The exact name of the organization or agency making the request and the date the project would begin if funded
- A copy of the letter from the Treasury Department of the U.S. that grants tax exempt status and a statement that the applicant is classified as "Not a Private Foundation" as defined in the Internal Revenue Code.

Electronic submission (preferred): via email to CMT@collinsmedicaltrust.org in a single .pdf document.

Hard Copy submission (double-sided, please): Submit one copy of the proposal. Mail to:

Administrator

Collins Medical Trust

29100 SW Town Center Loop W, Suite 300

Wilsonville, Oregon 97070

Phone: 503.826.5230

CMT@collinsmedicaltrust.org

<http://www.collinsmedicaltrust.org/>

Replies to Applications:

The Trustees meet **three times a year**, in January, May and September. Requests should be submitted by the **last business day of the month preceding** these months to receive timely consideration. It is not possible for the Trust to respond to emergency funding requests. When an application has been acted upon by the Trustees, a letter indicating the funding decision will be sent to the mailing address of the applicant by the first week in the following month.

Reports:

The organization receiving a grant from the Collins Medical Trust has a responsibility to report on the use of the funds. Unless otherwise indicated at the time disbursement is made, reports are requested to be made annually until a year after the project has been completed. These reports should cover not only progress but also evaluate the results achieved. Additionally, throughout the duration of the project, any substantial changes in scope, personnel, or funds that are re-directed from the original purpose should be reported to the Administrator of the Collins Medical Trust for approval by the Trustees at their next regularly scheduled meeting. Please note that the Collins Medical Trust expects acknowledgement, primarily in scientific publications, for its support of the project.