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:

The original Trust document states that monies from the Trust shall be used:

“To aid, further, promote, develop, encourage and sponsor research, experiment and work in the cause, cure and treatment of human disease or in any field of medical research, and to aid, further and promote medical education.”

With this statement as a guide, and having knowledge of the intent of the Trustor, Mr. Collins, and 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 which 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) Early career investigators (e.g., postdoctoral fellows and assistant professors) will be prioritized. They must be proposing projects that position them for future funding and must be clearly supported by their mentor(s).

5) The maximum funding for research grants is $30,000.

6) 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.

7) Disbursements are normally not made to “Private Foundations” as defined in the Internal Revenue Code.

8) The Trust does not support efforts to influence legislation or other political action.

9) In considering projects involving substantial funds, the Trust expects the applicant to explain what additional funds will constitute the balance for the total amount.

10) 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.

11) 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 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.

Other clarifying information:
1) The exact name of the organization or agency making the application, and the date the project would begin if funded.
2) A copy of the letter from the Treasury Department of the U.S. which 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 (including any supporting documentation). Mail to: Collins Medical Trust
Administrator
29100 SW Town Center Loop W, Suite 300
Wilsonville, Oregon 97070

Contact Information
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 redirected 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.