



**UT Health**

San Antonio

Institutional  
Advancement

## CORPORATE & FOUNDATION RELATIONS (CFR): FREQUENTLY ASKED QUESTIONS

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### **Where is Corporate & Foundation Relations located and what do they do?**

Corporate & Foundation Relations is an important function of the centralized Office of Institutional Advancement (OIA), located on the third floor of the AAB. CFR initiates and builds relationships with corporate partners, private foundations and other organizations, to strengthen UT Health San Antonio while also promoting our partners' philanthropic goals.

### **What services does Corporate & Foundation Relations provide?**

The Corporate & Foundation Relations team have specialized skills in working with corporations and private foundations. They can assist PIs with discovering new opportunities, strategizing potential funding asks, developing letters of intent and proposals, editing applications, communicating with corporations and private foundations on the PI's behalf, managing site visits, and providing coaching in preparation for presentations and meetings with corporations and private foundations.

### **Who do I contact if I would like to approach a private foundation or have a question about private foundations or corporations that might be a good fit for my research or program?**

Please contact [cfr@uthscsa.edu](mailto:cfr@uthscsa.edu) or call 210-567-9212, and your question will be answered by the appropriate person.

### **How do I know which private foundations or corporations might be interested in my work?**

If you are interested in exploring the various foundations that might have an interest in your research, project or program, please fill out a project fund request form, located on the CFR webpage. This form will provide a better understanding of the research/project, funding need and timeline. CFR will then be able to determine what funding sources might be a good fit and what will be required to submit an application. Once the form is submitted, you will be contacted by CFR within 7 to 10 business days to further discuss any opportunities and elaborate on any additional ideas you have for your project.

### **I do not need any help with my proposal or application. Why do I need to go through CFR before I approach a private foundation or corporation?**

As stated in Chapter 6 of the Handbook of Operating Procedures (HOP), all faculty, students and staff are required to work through the Office of Institutional Advancement (OIA) to secure funds through private sector support including foundations. OIA actively manages and stewards many foundation relationships. To alleviate confusion for our private foundation and corporate sponsors, clearance to apply for funding from private foundations must be requested before submitting a letter of inquiry or proposal.

### **Is UT Health San Antonio a 501c3 non-profit?**

No. While the University is tax-exempt, it is not a 501c3 organization and is therefore ineligible to apply for funding directly to foundations that require recipients to be 501c3. In such cases, The University of Texas Foundation (UT Foundation) can submit proposals on behalf of UT Health San Antonio. CFR acts as the direct contact to UT Foundation and CFR must be contacted if there is an interest in applying for opportunities that expressly require a 501c3 tax status.

### **Does CFR provide assistance with proposals to government agencies?**

No. All proposals and applications that are being submitted to government funding agencies must flow through the Office of Sponsored Programs.

### **How do I know when I should work with CFR and when I should work with OSP?**

Corporate & Foundation Relations and the Office of Sponsored Programs (OSP) work closely together to ensure that proposals and applications submitted to external partners for funding meet the standards of the university as well as the requirements of the private foundation/corporation. All proposals that include a budget must have a Certificate of Proposal (COP) and be reviewed by OSP prior to submission. Letters of Intent do not need OSP approval prior to submission, but do require CFR approval.

### **How long will it take to hear back after submitting an application to a private foundation?**

Once a proposal or application is submitted, the length of time it takes to be notified of the foundation's funding decision can vary greatly. Most foundation decisions are made by a board of directors that meet only periodically throughout the year. Depending on the funding cycle, it could take as little as 30 days or up to a full calendar year to learn a foundation's decision. In addition, there could also be a period of time between notification of award and receipt of the funding. Each foundation has its own timeline and unique process.

### **If the award letter from a foundation says that I need to send a report, what should I do?**

Private foundations and corporations awarding grants will often require interim and/or final progress reports. Timely and accurate submission of these reports are essential in maintaining a positive relationship with the foundation or corporation. The PI is responsible for submitting all reports. OSP will provide the PI with the Financial Status Report (FSR) as outlined in the award agreement. Please

contact CFR if you have any questions regarding the report or would like to have the report reviewed prior to submitting to the foundation. In some cases, the Office of Institutional Advancement will submit the report prepared by the PI directly. If this is the case, it will be stipulated in the Project Grant/Award Activation Notice (PGA). If a PI fails to prepare and submit an interim and/or final report, future funding for the project or from the foundation could be in jeopardy.

#### **What do I do if at the end of my award period, I have private grant funds left over?**

If the project will continue, a formal request to a foundation is needed for a no-cost extension on the grant to allow time to use the remaining funds. Please do not wait to inquire your request to the foundation at the end of the grant term, or assume that the foundation will approve the request. If your request is approved (in writing), you must notify OSP to update the grant record with a new project end date. Please consider that foundation awards frequently include terms that require the return of unexpended foundation funds. CFR is available to help navigate the no cost extension process with a foundation or corporation. If you feel a no cost extension will be needed for a private foundation, please contact CFR as soon as possible.

#### **Why do all sponsorships have to go through Corporate & Foundation Relations?**

All sponsorship activity must go through Corporate & Foundation Relations to accomplish two goals: (1) To ensure department and University interests are being protected, (2) To ensure the University is responsibly approaching corporate sponsors with partnership opportunities. Both goals accomplish and require a centralized approach.

#### **What services will Corporate & Foundation Relations provide for my event?**

Corporate & Foundation Relations provides sponsorship support for approved department and University events. By meeting with CFR prior to planning your event, you will be provided with examples and suggestions to help your event be successful while aligning with University standards. CFR does not produce materials for the event.

#### **What are the differences between a sponsorship, advertising, a gift/donation and a grant?**

A **Sponsorship** is a relationship/agreement with an external entity where that entity provides money, value in-kind goods and/or value in-kind services to the University and in return, the entity receives acknowledgment of the sponsorship on University marketing collateral or some other return benefit.

A **Gift or donation** is a voluntary transfer of funds or goods from an external entity for which it has no expectation of receiving benefits except for a charitable tax receipt and a name acknowledgment.

A **Grant** is funding provided by a sponsor, generally for a specific purpose (program or research), which generally outlines requirements for use of funds and reporting. In order to receive a grant, generally a written proposal or an application is submitted.

**Advertising** is a paid service purchased by an entity to announce, promote, or publicize a product, service or event.

#### **Where should sponsors send sponsorship checks and in-kind goods?**

All sponsorship payments should be sent to the Office of Institutional Advancement, 7703 Floyd Curl Drive, MC 7835, San Antonio, TX 78229. The Office of Institutional Advancement has a gift processing team whom will appropriately accept and receipt all sponsorship payments and transfer proceeds to the department PID that is established for the event. Departments will be responsible for receiving/collecting any in-kind goods that are part of the sponsorship agreement directly.

#### **Are sponsorships eligible for a tax receipt/charitable deduction?**

Yes and No. While sponsorships are generally tax-deductible for the sponsor, depending on what benefits are being offered to the sponsor as part of the sponsorship agreement, the sponsorship may/may not be issued a formal tax receipt. The University will provide a letter acknowledging the receipt of the payment to the sponsor. In this type of agreement, the business may decide to use funds from a marketing or sponsorship budget, as opposed to a philanthropic budget. There is often a greater tax advantage for a business to claim their contribution as a business expense write-off than a charitable donation. However, if a charitable donation receipt is requested, the university's department of gift processing will assist in determining which portion of the sponsorship is considered a charitable donation.

#### **Does the University provide a tax receipt for in-kind donations?**

In kind donations will only be eligible for a tax receipt if the donation involves the transfer of a physical object from the donor to the University. The request for a tax receipt must be accompanied by documentation which officially indicates the fair market value of the item. Typically, gift certificates issued directly by the company are not eligible for a tax receipt.

#### **Will a tax receipt be provided for donations of services?**

Tax receipts are not issued for donations of services.

#### **What acknowledgment can we give our sponsor without providing substantial return benefit?**

You can acknowledge the sponsor by publishing the name, product line, logo and slogan, as long as they don't contain any qualitative or comparative descriptions of its products, services, facility or company. You may also provide the sponsor's location, telephone numbers, internet address, and value-neutral descriptions.

#### **Our website has a hyperlink to our sponsor's URL. What special issues should we be aware of?**

Hyperlinks to external pages are only allowed with approval by your Marketing & Communication Team Web Liaison.