



Proposal Clearance Process
Office of Institutional Advancement
Xavier University of Louisiana

The Office of Institutional Advancement Proposal Clearance Process is required for any faculty-related or initiated project to be funded by private sources. This includes proposals to:

- Private Foundations
- Individuals (non-alumni)
- Corporations
- Academic Associations
- Private Educational Institutions

In general, private funding is considered a non-governmental source of funding.

Step One

The PI(s) should contact the Office of Institutional Advancement to discuss their proposed project/initiative, funding source, and timeline well in advance of the funding need. Generally, the Office of Institutional Advancement attempts to position proposals **no less than** a semester in advance of needed funding.

Following an in-depth conversation with the appropriate Office of Institutional Advancement staff person regarding private funding source fit, feasibility, and alignment with Institutional funding priorities and mission, the PI will be directed to proceed to step two.

Please note: We recommend all PIs have a discussion with their Division Heads, Department Chairs, and/or the Office of Academic Affairs prior to commencing the process with Institutional Advancement to ensure that the proposed project and/or funding request is in alignment with their respective strategic direction and institutional priorities.

Step Two

The PI (Principal Investigator) must complete the IA Proposal Clearance form which includes:

- Proposal Clearance Form & Pre-Clearance Routing Signature Page
- Proposal Abstract
- Draft Budget
- Budget Justification

Abstract

The program/project abstract should be comprised of a one-page or less description of the proposed project, including objectives, purpose, contribution to the mission and goals of Xavier University of Louisiana, and fit with the Foundation/private funding source's priorities.

Draft Budget

Please provide a draft budget for the proposed program/project. A Xavier University budget template may be located on the Office of Institutional Advancement webpage.

Budget Justification

Please provide a brief description for use of the funds being requested (where necessary and appropriate) and a rationale for the amount requested. A justification for each line item should be provided, where necessary.

Current and Pending Support

If applicable, please list any current and/or pending support for the proposed program/project with corresponding dollar amounts.

Step Three

Please ensure that all of the necessary signatures and approvals have been gathered via the IA Pre-Clearance Proposal Routing Form.

Step Four

The completed IA Proposal Clearance Form with required addendums should be emailed to:

Mr. Stephen Engro
Assistant Vice President, Development
sengro@xula.edu

and

Dr. David W. Robinson-Morris
Director of Corporate and Foundation Relations
drmorris@xula.edu

Step Five

The appropriate development officer/staff person within the Office of Institutional Advancement will contact you with any questions, comments, and/or concerns that may arise regarding your proposal. You will be asked via one-on-one consultation to address these questions, comments, and/or concerns. Given their research, knowledge, and expertise, the IA staff person will then work with you to craft a proposal to the private funding source that fits within their funding priorities and meets the needs of the University.

Again, it should be noted, the proposal/programmatic objectives may be altered and/or adjusted to formulate a final proposal that constitutes a mutually beneficial undertaking between both the University and the private funding source(s). All due effort will be made to ensure that final proposal adheres as closely as possible to the content of the proposed abstract and fully encapsulates the *spirit* of the proposed abstract.

Step Six

The appropriate IA staff person will submit the proposal on your behalf to the private funding source, unless otherwise specified.