



SPIE Endowment Matching Program: Proposal Guidelines and Assessment Criteria

Written proposals should be at least 5 and no more than 10 pages in length, with a font of 11-12 pts., and standard margins.

The proposal should include:

- **Contact Information.** The name, address, email, and telephone number of the person proposing the endowment program and the name and address of the organization that would benefit from this gift.
- **CV of principal proposer.** A short CV of maximum 2 pages.
- **Description of the endowed activity.** Describe how this request will be used (for example, endowed chair, scholarship, or other use) and how this will benefit the optics and photonics community.
- **Proposed Name.** SPIE obtains naming rights for the endowed activity (for example, SPIE Chair for Optics and Photonics). Include any organizational requirements that restrict naming conventions.
- **Financial Request.** Endowments must be matched one-to-one (or more substantially) from other sources.
 - Is this endowment to be funded in perpetuity, if not, why?
 - What amount is requested from SPIE (maximum \$500,000)?
 - What person(s) or organization(s) are providing the match for the SPIE gift?
 - Is this funding currently being held within the organization? If not, when or under what conditions will the funds be available?
- **Alignment with SPIE Educational Mission.** The benefitting institution must have a recognized optics/photonics degree-granting program, or the equivalent for other disciplines aligned to the SPIE educational mission (including optics/photonics options).
 - List the optics/photonics (or equivalent) degrees granted by the organization. Include the number of current students, and number of degrees granted for each of the last five years.
 - List the optics/photonics (or equivalent) courses that are offered annually, and the faculty that provide this education.
 - Provide a link to the program's website.
 - Indicate how the proposal showcases the potential for diversity (as defined by career stages, technical areas, location, geography, and/or access).
- **Fund Management.** Funds will be managed by the benefitting institution to preserve the principal of the donation in perpetuity or for a negotiated long-term timeframe. The benefitting

institution must have an appropriate administrative structure to manage endowments.
Please provide:

- Proposed duration for annual endowment disbursements.
- Estimated annual disbursement amount. Include any fees are charged to endowment, or restrictions placed on use of the disbursements.
- Number of endowed activities the institution currently supports. Total amount of the organization's endowment.
- A copy of the standard endowment contract if the institution has one.
- Contact information of the department/service that manages endowments.

Proposals must be submitted via email to outreach@spie.org.

NOTE: If sovereign laws prohibit funding in perpetuity benefiting institutions, you must provide reason for an exception.