

Corporate & Foundation Relations (CFR) Submission Process

IDENTIFICATION & INITIAL STAGES

DOD or PI notifies CFR Director of a grant/funding opportunity they wish to pursue.

CFR reviews grant announcement/RFP for the following: ensuring eligibility, any submission limitations, & verifies campus project aligns with Funder's mission & funding priority

Grant submissions are managed collaboratively between CFR and College/Department/Program development director and/or faculty to ensure:

- Accuracy in submitted documents
- Adherence with University and Foundation policies
- Coordination of multi-disciplinary grants
- Collaboration with Research & Sponsored Programs, if required.

DOD or CFR Creates New Plan/Opportunity

- Determines assignment type – CFR, DO, Prospect Manager, other relevant Team Members
- Status Updates for Plan/Opp
 - All Substantive Contacts
 - POC info updates
 - Documentation
 - Any other relevant info

DOD & CFR determine who else needs to be involved in grant preparation & together hold initial preparation meeting:

- PI or Program Director
- Division/College Grants Administrator
- Other team members

PREPARATION

CFR provides assistance with:

- Identifying proposal components
- Managing grant timeline
- Preparation and review of proposal
- Budget preparation
- Review & editing of narrative/budget and preparation for successful proposal submission
- Verifying all required financial and supporting documents have been obtained & uploaded
- Ensures College level approvals have been obtained (Dean, Dept. Chair, Business Office, etc.)
- Review of proposals prior to submission by the appropriate CFR Director
- Submission of final proposal via portal or funders preferred method of delivery
- Foundation CFO signs all proposals requiring authorized signature prior to submission

SUBMISSION

CFR will provide assistance with:

- Submission of final proposal via portal or funders preferred method of delivery
- Mails hard copy if required
- Updates Status and Records in RE: LOI or Proposal was submitted with submission date
- Coordinates with DO to ensure a PDF copy of final submitted LOI or proposal is attached to the appropriate plan in CRM
- When grant is awarded, ensures copy of grant agreement is reviewed and signed by appropriate WVUF signatory
- Works with Gift Processing to submit Gift Intake Form
- Works with Finance team to create new budget
- Works with DO to ensure gift is linked to grant opportunity in CRM
- Ensures grant report due date is recorded in RE Actions - Next Step POST AWARD REPORTS