

WVUF Corporate & Foundation Relations - Standard Operating Procedure

Coordination with CFR

Updated: February 2, 2026

Purpose: Establish coordination process for all development staff and university personnel engaging with or soliciting funding from corporate and foundation entities. Procedure ensures a unified institutional strategy, prevents conflicts of interest, and guarantees compliance with university and foundation guidelines by routing all inquiries and proposals through the West Virginia University Foundation (WVUF) Corporate and Foundation Relations (CFR) team.

Scope: Procedure applies to all university staff, faculty, principal investigators (PIs), and development officers looking to engage with or seek funding from private foundations, corporations, and organizations.

Definitions: **CFR Team** – Corporate and Foundation Relations team within WVUF responsible for managing relationships and applications with external foundations and corporations; **Development Officer (DO)** – director of development responsible for leading and executing fundraising and donor relations efforts specifically for a particular college, school, clinical unit within the university or health system; **Principal Investigator (PI)** – lead researcher or project manager for a grant-funded project; **Executive Director of Corporate and Foundation Relations (ED of CFR)** – WVUF CFR team lead responsible for developing, managing, and executing a comprehensive strategy to secure philanthropic support from corporations and private foundations; drives the overall CFR strategy; **Office of Sponsored Programs (OSP)** – WVU's OSP reviews and accepts proposals **only** on behalf of WVU and WVU Research Corporation.

Phase 1: Essential Outreach & Funding/Solicitation Pre-Clearance

Development staff and faculty are expected to partner with the WVUF Corporate and Foundation Relations (CFR) team by consulting with them prior to contacting any corporate or private foundation entities regarding funding opportunities and/or solicitations. If a funder contacts a faculty or staff member directly, it is expected that the CFR team be notified immediately to assist with the next steps. Early coordination is essential as it: (1) allows CFR to manage the submission process, (2) prevents conflicts of interest, and (3) maximizes the potential for success while ensuring compliance with all university and foundation regulations and guidelines.

- **Opportunity Identification:** Prior to moving forward with next steps, development directors and/or faculty are expected to communicate with the appropriate person on the CFR team, the assigned prospect manager, and the unit research administrator as appropriate regarding the prospect.
- **Initiating Contact:** Reach out to a specific CFR team member via email and cc: the grants@wvuf.org team address, send an email to the team in general at grants@wvuf.org, or submit an inquiry through the appropriate request form located in Foundation Services (New Request→Development→CFR Service Request) or in "Services" on the CFR webpage @ <https://wvuf.org/ways-to-give/corporate-and-foundation-relations>.

Phase 2: Strategy and Assessment Initial Meeting

CFR will arrange an initial preparation meeting with the PI and the development director, including other relevant stakeholders as needed.

- **Opportunity Review:** The CFR team will review the RFP/grant announcement to check for eligibility, submission limitations, and alignment with the funder's mission.
- **OSP/IRB Considerations:** If necessary, the **Executive Director of CFR** will consult with the WVU Research Office to determine proper routing and review possible conflicts.

Phase 3: Proposal Development & Ongoing Coordination

Once a funding opportunity is cleared, Development staff and faculty must maintain active coordination with the CFR team throughout the drafting process to ensure a high-quality submission in compliance with WVUF standards.

Responsibilities during the development phase are divided as follows:

- **Faculty/Development Staff:** Primary responsibility for drafting the "Case for Support," scope of work, and technical program details.
- **CFR Team:** Responsible for reviewing the narrative for alignment with funder priorities, finalizing the budget, securing institutional signatures, and ensuring all application guidelines are met.

Note: To ensure timely submission and prevent last-minute delays, frequent communication is encouraged. Significant changes to the project scope or budget during the drafting phase should be **promptly** communicated to CFR to ensure continued alignment.

Phase 4: Submission Authority and Portal Access

To ensure institutional integrity and strategic coordination, the CFR team serves as the authorized point of contact and submission agent for all corporate and foundation proposals. The CFR team takes responsibility for the final submission process to leverage our institutional access and maintain compliance. The CFR team maintains exclusive management of login credentials for funder submission portals. CFR staff will handle the data entry and execute the final submission of the request.

These parameters exist to ensure:

- **Conflict Avoidance:** Preventing multiple internal units from approaching the same donor simultaneously.
- **Limited Submission Equity:** Managing opportunities where the funder limits the number of applications per institution.
- **Relationship Management:** Safeguarding the University and Foundation's long-term relationship with the partner.

Phase 5: Post-Award Acceptance, Processing, and Stewardship

Upon notification of an award or receipt of funding, the following protocols apply to ensure proper management and donor relations:

- **Award Acceptance:** All grant agreements, contracts, and award letters must be reviewed and approved by the CFR team and signed by an authorized institutional signatory. Faculty and staff are not legally authorized to sign binding funding agreements; this safeguard ensures the university accepts appropriate risk and terms.
- **Gift Processing:** Forward all award notifications and checks to CFR immediately. CFR will process the funds, ensure standard stewardship and receipting procedures, and initiate the setup of the restricted fund account.
- **Reporting & Stewardship:** CFR will track all reporting deadlines. While CFR submits the final reports to the funder, the Principal Investigator (PI) or Project Lead is responsible for providing the data, financial details, and narrative updates required to satisfy the grant conditions.

Strategic Rationale for Coordination with CFR:

- **Conflict Prevention:** Multiple departments or researchers may be interested in a particular funder, and CFR ensures coordination of submissions with the university to avoid confusion and conflict.
- **Limited Submission Compliance:** Many foundations limit the number of applications an institution can submit. CFR will manage the internal competition process for these opportunities alongside the Office of Sponsored Programs and the WVUF Chief Development Officer.
- **Expertise Leverage:** CFR has experience with the funding landscape and can provide valuable assistance with proposal development, budget preparation, and navigating complex requirements.
- **Relationship Management:** Foundations often have ongoing relationships with universities. CFR can manage these relationships and ensure additional requests are consistent with the larger picture.
- **Accuracy and Compliance:** CFR, along with other offices like the Office of Sponsored Programs, helps ensure all submitted documents are accurate and comply with both university and foundation policies.