

## WVUF Corporate & Foundation Relations - Standard Operating Procedure

### RFP Distribution and Tracking

**Updated:** November 25, 2025

**Purpose:** Outline the standardized process for the West Virginia University Foundation's Corporate and Foundation Relations (CFR) team to distribute Requests for Proposals (RFPs) to Principal Investigators (PIs) and development professionals across campus. Also details the procedure for tracking these RFPs and their responses to ensure effective communication, timely submission, and robust data management.

**Scope:** Procedure applies to all CFR staff responsible for identifying, distributing, and tracking grant opportunities from corporate and foundation partners. Also establishes the communication protocol for collaborating with university PIs and development staff.

**Definitions:** ***Principal Investigator (PI)*** – lead researcher or project manager for a grant-funded project; ***CFR Team*** – Corporate and Foundation Relations team within West Virginia University Foundation (WVUF) responsible for managing relationships and applications with external foundations; ***Director of CFR Operations and Support*** – central operations Director for WVUF's Corporate and Foundation Relations (CFR) team responsible for the efficient, compliant, and documented flow of all CFR activities; ***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.

#### ***Review and Distribution Processes***

##### **Phase 1: RFP Identification and Intake**

CFR team identifies potential RFPs through various channels including direct communication from funders, dedicated grant databases, and alerts from campus partners. The Director of CFR Operations and Support will conduct an initial review to assess the RFP's alignment with WVU's strategic priorities and confirm eligibility requirements. Upon confirmation, a new record for the RFP will be created in the CFR Grants Calendar and the CRM database, capturing key information such as:

- Funder Name
- RFP Title
- Deadline for submission
- Maximum award amount
- Key contact information at the funding entity

##### **Phase 2: Internal Communication and Distribution**

The appropriate CFR Team member will draft a summary of the RFP, highlighting crucial details including:

- Project focus areas
- Eligibility requirements (e.g., specific departments, faculty ranks, or research types)
- Mandatory forms or documentation
- Internal and external submission deadlines

This summary, along with a link to the full RFP document, will be distributed to relevant Associate Deans of Research, PIs and development professionals across campus via email, a targeted email listserv, or a designated communication channel (e.g., Microsoft Teams, department-specific email groups). The communication will include a link to the CFR's Project Summary Form and should be returned to [grants@wvuf.org](mailto:grants@wvuf.org).

### **Phase 3: Tracking and Follow-up**

All PIs and development professionals interested in responding to the RFP must submit a completed Project Summary Form to the CFR team as above at [grants@wvuf.org](mailto:grants@wvuf.org) by the designated internal deadline. This form serves as the official notification of intent. The Director of CFR Operations and Support is responsible for tracking all submitted Project Summary Forms in the CRM. The CRM record for the RFP will be updated to reflect the interested parties and their assigned CFR liaison. Regular follow-up communications (e.g., bi-weekly or weekly emails) will be sent to the PIs and development teams who have expressed interest, providing reminders of upcoming deadlines and offering support.

### **Phase 4: Response Management and Archiving**

Once a response to an RFP has been submitted, the relevant CFR/Development staff liaison will update the CRM record with the submission status and date. A copy of the final proposal and any related documentation (e.g., letters of support, budget breakdowns) will be stored in the designated CFR SharePoint folder. This ensures a centralized archive for institutional knowledge and future reference. Tracking will be updated to reflect the outcome of the submission (e.g., "Pending," "Awarded," or "Declined").

### **Summary of Responsibilities:**

- Director of CFR Operations and Support: Manages the entire process from RFP identification to tracking and archiving. Ensures all steps are completed accurately and on time.
- CFR Development Team: Identifies and provides context for potential RFPs. Serves as the primary liaison for PIs and development professionals responding to opportunities.
- Principal Investigators (PIs) and Unit Development Officers: Submit the Project Summary Form to signal their intent to respond. Provide all necessary documentation for the final proposal.