

## WVUF Corporate & Foundation Relations - Standard Operating Procedure

### CFR Internal Collaboration and Communications

**Updated:** January 13, 2026

**Purpose:** To establish clear communication protocols, reporting channels, and meeting cadences for the Corporate and Foundation Relations (CFR) team and internal university stakeholders. This procedure ensures efficient information sharing regarding grant activities, fund establishment, and strategic alignment between the CFR team, development officers, faculty, and WVU and WVUF leadership.

**Scope:** This procedure applies to the Corporate and Foundation Relations (CFR) team and all WVU and WVUF Development Officers (DOs). It governs the internal mechanisms for strategic planning, prospect clearance, proposal intake, grant management, and financial processing; ensuring a unified approach to corporate and foundation engagement across the university system.

**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; **Executive Director of Corporate and Foundation Relations (ED of CFR)** - CFR team lead responsible for developing, managing, and executing a comprehensive strategy to secure philanthropic support from corporations and private foundations.

#### CFR Communication Channels

To ensure efficiency, the CFR team utilizes the following channels for internal team communication:

- **Email:** Used for all items that need to be tracked, forwarded, discussed in a thread, or require further research/detailed input. Especially important for proposal development and funder-related communications to be in email and filed as an interaction in CRM.
- **Slack:** Used for daily updates about scheduling, team operating notes, and general updates that do not require formal follow-up or permanent record-keeping.
- **Phone Calls:** Used when immediate input or urgent resolution is required.
- **Text Messages:** Used as needed for urgent logistics or time-sensitive reminders.

#### Development Officer Protocols & Information Sharing

To maintain a unified fundraising strategy, Development Officers (DOs) are expected to adhere to the following communication and notification protocols:

- **Service Center Forms:** DOs must utilize the appropriate WVUF Service Center form for official intake.
  - Fundraising Consultation and Prospect Research Request – Use this form to request a consultation and prospect research from the CFR team. This is the first step for aligning your project with suitable corporate and foundation funders and developing a philanthropic funding strategy.
  - Funder Engagement and Proposal Development Request – Use this form to request support for engaging a potential funder (e.g., scheduling a meeting, submitting an inquiry) and/or to initiate the process for developing and submitting a formal proposal to corporate and foundation entities.
  - Post-Award Service Request Form – Use this form to request administrative services related to an existing corporate or foundation grant, including (but not limited to) budget/balance review, no-cost extensions, stewardship reporting, and renewal funding preparation.
- **CRM Documentation:** All substantive interactions with foundation prospects or internal strategy discussions regarding these prospects must be logged as "Interactions" in CRM. DOs should include relevant CFR team members in these interactions to ensure transparency.
- **New Fund Updates:** The Executive Director of Corporate and Foundation Relations must be copied or included on all notifications regarding the creation of new funds related to corporate or foundation awards. This ensures the central team can immediately track incoming revenue against team goals and make necessary updates to the CFR Grants calendar regarding report submission due dates. *Refer to the **New Grant Fund Process SOP** for more information.*
- **Ad-Hoc and Urgent Notifications:** For time-sensitive opportunities or complications where a Service Center form is not practical, DOs should email **both** the Executive Director of CFR and [grants@wvuf.org](mailto:grants@wvuf.org) to alert the team immediately.

### **CFR Meeting Cadence**

#### **Weekly CFR Team Meeting**

- **Frequency:** Weekly (Same day and time)
- **Duration:** 30-45 minutes
- **Attendees:** All central CFR team members.
- **Purpose:** To provide updates on all active projects, review weekly priorities, and troubleshoot any issues. This meeting ensures the team is aligned and moving forward effectively.

### **Bi-weekly 1:1 Meetings (CFR Team Member with Executive Director)**

- **Frequency:** Bi-weekly (Same day and time)
- **Duration:** 30 minutes
- **Attendees:** CFR team member and the Executive Director of CFR.
- **Purpose:** To provide dedicated time for individual team members to discuss their portfolio and professional development and receive direct coaching and feedback.
- **Preparation:** The team member will email an agenda to the Executive Director 24 hours before the scheduled meeting (e.g., if the meeting is on Monday, the agenda is sent at the corresponding time the Friday before).

### **CFR Monthly Strategic Planning Meeting**

- **Frequency:** Monthly (Day and time may vary due to scheduling needs)
- **Duration:** 60-90 minutes
- **Attendees:** All members of the CFR team – including WVU Medicine Children’s Associate Director of CFR and their Senior Director (optional).
- **Purpose:** To review the overall team strategy, discuss upcoming submissions and reporting timelines, conduct pipeline reviews, share ideas/struggles, and engage in relevant professional development or host guest speakers.

### **WVU/WVUF Corporate Relations Strategic Planning Meeting**

- **Frequency:** Quarterly (Day and time may vary due to scheduling needs)
- **Duration:** 60-90 minutes
- **Attendees:** All members of the WVU and WVUF Corporate Relations teams, DOs, WVU Faculty operating in the corporate space, and other relevant parties – this is an evolving list dependent upon the focus of the meeting
- **Purpose:** To review the overall partner strategy, discuss upcoming opportunities and funding priorities/needs, share ideas/struggles, and engage in relevant professional development or host guest speakers.

### **Meetings with Internal Stakeholders**

- **Frequency:** As needed
- **Duration:** 30-60 minutes
- **Attendees:** Appropriate CFR team member(s) and relevant internal stakeholders.
- **Purpose:** To foster strong relationships with WVUF/WVU/WVU Medicine partners (development colleagues, senior leadership, deans, faculty, program directors) and ensure the CFR team is aware of their funding needs and priorities.