

WVUF Corporate & Foundation Relations - Standard Operating Procedure

Benedum Foundation

Updated: December 5, 2025

Purpose: The WVU Foundation (WVUF) Corporate and Foundation Relations team is the main point of contact for requests to the Claude Worthington Benedum Foundation. While this should be the case for all private foundations, the Benedum Foundation has specifically requested that they not be approached by multiple parties.

Scope: Procedure applies to all university staff, faculty, principal investigators (PIs), department heads, and development officers involved in the submission of applications for funding and post-award management (including reporting) for philanthropic grants from the Benedum Foundation.

Definitions: **Principal Investigator (PI)** – lead researcher or project manager for a grant-funded project; **CFR Team** – Corporate and Foundation Relations team within WVUF responsible for managing relationships and applications with external foundations; **Benedum Program Officer** – Benedum Foundation program officer who researches, evaluates, and selects proposal submissions to share with the Benedum Foundation Board of Trustees for potential funding

Phase 1: Concept Paper Review and Submission

- When a PI first considers application to the Benedum Foundation, the interested PI is expected to reach out to the CFR Team to discuss a potential submission. The CFR team will confirm alignment and provide the PI with the Benedum Concept Paper Form and proposed budget on the Benedum Project Budget Template Form.
- As requested by Benedum, the PI will complete the Benedum Concept Paper Form and proposed budget on the Benedum Project Budget Template Form outlining the details of the submission. With Benedum's permission, the CFR Team Member will then forward the Concept Paper and Budget Template to the corresponding Program Officer at the Benedum for the Program Officer's review and further direction.

Phase 2: Application Process and Portal Access

- If the PI's Concept Paper is approved by the Benedum Program Officer for further consideration, the CFR Team will work with the PI to prepare a draft application within the Benedum portal.
- Once the **Program Officer has no edits or requests regarding the draft application as prepared in the portal**, the CFR Team Member will authorize the submission. Copies of the submission will be forwarded to all relevant parties.
- The Benedum Board of Trustees reviews applications quarterly. The Benedum program officers work within the quarterly timeframe to review invited draft applications as above.

- Typically, applications will be reviewed in the quarter in which the Benedum program officer endorsed submission; however, there have been occasions when applications have been held over (i.e. March held to June).

Phase 3: Award Notification

- **If the application is approved:** The Grant Agreement will be sent via DocuSign directly to the WVUF President and CEO. The CFR team will ensure the Agreement is properly executed.
- After the Agreement has been executed, the Director of CFR Operations and Support will submit a New Grant Fund Processing Form in Foundation Services (New Request→Gifts→New Grant Fund Processing). Refer to **New Grant Fund Processing SOP**.
- When the new fund number is received, the Director of CFR Operations and Support will submit a Gift Deposit Form in Foundation Services Foundation Services (New Request→Gift→Gift Intake) to ensure the Advancement Data Services Team has all necessary information and that all relevant parties are advised of the fund number.
- The CFR team member responsible for the prospect plan will ensure all documents are attached to the plan in the CRM system and will work with the Director of Operations and Support to ensure reporting requirements are properly reflected with the Director of Operations and Support as a step participant for reporting.
- **If the project is held over or not selected for funding:** the CFR Team will follow up with the PI and Benedum Program Officer to determine next steps, if any. If none, the CFR team will close the plan in the CRM system.

Phase 4: Life of the Grant and Reporting

- **Tracking:** The CFR Team maintains a centralized system to track all reporting deadlines (both financial and narrative) stipulated in the Grant Agreement.
- **Deadlines:** Director of CFR Operations and Support will contact the PI quarterly to provide balance updates and will issue reminders to the PI and other relevant parties approximately 60 and 30 days prior to reporting due dates. When a report is due to the Benedum Foundation, the PI will receive notice that the report is available in the Benedum Portal under their username within 30 days of the due date. The PI will work with the Director of CFR Operations and Support and the CFR team to complete and submit the report.
- **Budget Completion:** The Director of Operations and Support will work with the WVU Foundation Finance Team as well as the unit business officer to ensure accurate budget submission is accurate.
- **Report Final Review and Submission:** CFR Team will be responsible for the final review and submission of the report. The Director of CFR Operations and Support will ensure that final copies of the report are shared with all relevant parties, stored in CRM, and housed as a backup on the CFR Team SharePoint for future use.