CFR RESOURCE DOCUMENT

CFR Plan Types

It is important that all corporate and foundation plans are tracked correctly by plan type.

Corporate Ask: Use this plan type when creating a plan for a corporation.
Foundation Ask: Use this plan type when creating a plan for a foundation.

Lead Annual Giving Foundation/Corporation Ask

Use this step outline when you're planning to ask a corporation or foundation for a gift in the Lead Annual Giving Range ($5,000-$49,000).

The steps in this outline are as follows:

- Contact 1 – *use for discovery*
- Contact 2 – *use for cultivation*
- Strategy Session
- Solicitation
- Close Gift – *step should be completed when notification of the award is received*
- Close Plan – *step should be completed at the end of the grant period after all reporting requirements are submitted*

Major/Principal Corporate Ask

Use this step outline when you're planning a corporate ask in the major gift range: $50,000-$999,999.

The steps in the outline are as follows:

- Identify opportunities to engage on campus
- Strategy Session with Internal Stakeholders
- Qualification
- Add Opportunity
- Submit CFR Service Request Form – *if applicable*
- Proposal Development with Unit Partners
- Proposal Submission
- Close Gift – *step should be completed when notification of the award is received.*
- Establish Grants Administration – *serves as a placeholder for reporting plan steps - Director of CFR Operations and Support will update as appropriate and both the DO and Dir Ops & Support will be on these plan steps as solicitors*
- Close Plan – *step should be completed at the end of the grant period after all reporting requirements are submitted*

Major/Principal Foundation Ask

Use this step outline when you're planning a foundation ask in the major gift range: $50,000-$999,999.

The steps in this outline are as follows:

- Identify opportunities to engage on campus
- Strategy Session with Internal Stakeholders
- Qualification
- Submit LOI/Concept Note
- Invitation to Submit Full Proposal
- Add Opportunity
- Submit CFR Service Request Form – *if applicable*
- Proposal Development with Unit Partners
- Proposal Submission
- Close Gift – Step should be completed when notification of the award is received.
- Establish Grants Administration – *serves as a placeholder for reporting plan steps - Director of CFR Operations and Support will update as appropriate and both the DO and Dir Ops & Support will be on these plan steps as solicitors*
- Close Plan – *step should be completed at the end of the grant period after all reporting requirements are submitted*

CFR Referral Plan

Use this step outline when referring a colleague/faculty member to an application or proposal for a corporation or foundation.

The steps in this outline are as follows:

- Referral sent to Unit Colleague/Faculty
- Follow-up with Unit Colleague/Faculty
- Record of Intent to Apply
- Close Plan

CFR Naming Convention

Utilizing the CFR Naming Convention ensures accurate and easy dentification for all users across any access point including but not limited to CRM, FE, and the CFR maintained SharePoint. This naming convention should be used for plans and documents pertaining to foundations, corporations, and organizations.

FY_DO/PI_ Funder_Description

Example: FY26_Cross/Wood_PallHunt_ Food is Medicine

CFR Grants Calendar

The CFR Grants Calendar is shared resource available in the Foundation's instance of Outlook. This calendar contains a full listing of upcoming deadlines for foundations, corporations, and organizations as well as RFP's that could be applicable to WVU programs.

The color categories used are:
- **Red Category** – Proposal/Application/RFP/LOI Due Date
- **Orange Category** – Report Due Date
- **Green Category** – Software License Renewal Date

This resource is accessible by utilizing the Add Calendar button on the Outlook Calendar view and searching for CFR Grants. Once the CFR Grants calendar is selected from the list, click the ***Calendar > OK*** to add the shared calendar.

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