# CORPORATE AND FOUNDATION RELATIONS
# PRIVATE FOUNDATION WORKFLOW

## QUALIFICATION STAGE

Faculty member identifies a grant opportunity (request for proposal, renewal, verbal or written invitation to apply, etc.).

Unit Lead/Development Officer identifies a grant opportunity.

Corporate & Foundation Relations (CFR) identifies a grant opportunity (request for proposal, renewal, verbal/written invitation to apply).

Inform Associate Dean or the Dean of Research of interest.

Faculty fills out the Faculty Grant Proposal Intake Form. Corporate & Foundation Relations (CFR) determines the eligibility/alignment, level of participation. If necessary, requests meeting with the corporation/ foundation to discuss proposal.

CFR submits opportunity to Dean, Associate Dean of Research, Unit Lead, or directly to Faculty member for review. If required, CFR will assist with limited submission competition.

If submitted through CUF, CFR will still advise and inform OSP for their awareness and inclusion in InfoEd.

If submitted through OSP, please inform that department of official submission.

## PROPOSAL PREPARATION

CFR arranges meeting with PI(s) and OSP (if required).

OSP (if required) sets deadlines for review.

PI(s) prepare budget.

CFR creates account for submission (if required) and prepares a shared document for narrative writing/application questions. CFR provides any required organizational information.

CFR provides OSP with grant guidelines for review.

PI(s) submit budget and narrative to OSP and CFR.

If matching gifts are required, CFR coordinates with the PI(s), ADRs, and other stakeholders to secure resources from other departments.

CFR assists with any required letters of support, including from the President or Provost Office.

CFR reviews all application components and provides edits if needed.

PI(s) approve any edits for final submission.

## SUBMISSION

OSP approves proposal for submission (unless submitted through CUF).

CFR submits the application through grants portal or other submission process.

## REPORTING STAGE

**If Grant is Approved:**

CUF and OSP provide all necessary signatures on grant agreement.

OSP prepares budget reporting or other involved departments (Financial Aid, etc.) provide required information.

CFR maintains grant reporting calendar and monitors deadlines in concert with the post-award team if submitted through OSP. If submitted via CUF, CFR will work with the PI(s) on reporting.

CFR works with PI(s) to develop impact report.

CFR submits report to funder.