

## **Donor/Sponsor Relationship Coordination Process**

OSU and the OSU Foundation (OSUF) are committed to coordinating relationships with sponsors/donors that support Oregon State University as a whole. OSU and OSUF are implementing a proactive approach to build long-term, lasting partnerships with corporate and foundation donors/sponsors by utilizing the effective relationship management skills of the foundation and the efficient monitoring and administration processes of sponsored programs/post award administration.

OSU and the OSU Foundation have created a Workgroup to jointly coordinate the external relationships with corporate and foundation donors/sponsors. The Workgroup is comprised of staff from Sponsored Programs, Post Award Administration, and the OSU Foundation. Sponsored Programs and Post Award Administration will be responsible for internal monitoring, record keeping and compliance on behalf of the University. The OSU Foundation and Sponsored Programs and Post Award Administration will work together to prepare, review, and submit proposals and monitor awards for centrally coordinated<sup>1</sup> corporate and foundation donors/sponsors by following the processes outlined below.

- Process for centrally coordinated corporate and foundation prospects, and others deemed appropriate by the Workgroup:
  - The lists of centrally coordinated corporate and foundation sponsor/donors will be maintained on the Research Office website, and the OSU Foundation's website will contain a link to this list on their website.
  - Corporate and Foundation Relations (CFR) in OSUF will work with the faculty member and unit development officers to prepare letters of inquiry and/or proposals.
  - If the grant is a sponsored project, completed, signed and approved proposals and proposal transmittal forms will be transmitted to sponsor either by Sponsored Programs or the Principal Investigator, depending on sponsor requirements. CFR will receive a copy of the proposal transmittal form. In the case of electronic submissions, Sponsored Programs will forward a copy of the proposal document; in the case of paper submissions, the Principal Investigator can provide CFR with a copy.
  - If the grant is a sponsored project, all award documentation will be sent to the Office of Sponsored Programs. The Office of Post Award Administration will be responsible for acceptance of funds and award set-up. In addition, the Office of Post Award Administration will provide a copy of award documentation and financial reports to CFR.
  - If the proposal is being submitted for a gift, CFR will be responsible for the submission, and will provide Sponsored Programs with a copy of the submission.
  - In the case of a gift, the donor/sponsor will send award documentation to CFR.
  - CFR will track reporting due dates and other centrally coordinated donor/sponsor requirements.

- CFR and Post Award Administration will coordinate preparation of the donor/sponsor reports. If the award is a sponsored project, Post Award Administration will prepare the financial report per sponsor requirements and provide a copy to CFR for incorporation into donor/sponsor report. CFR will work with faculty to write the report narrative, incorporate the financial report, and send the final report to the donor/sponsor.
- Staff from the Office of Sponsored Programs, the Office of Post Award Administration, and the OSU Foundation (the Workgroup) will meet monthly to coordinate relationships with sponsors/donors.
- The OSU Foundation will provide OSU's Office of Sponsored Programs and the Office of Post Award Administration with reports on all gifts received, on a monthly basis. The OSU Foundation has Data Warehouse access and a query to access all sponsored project award received from non-governmental entities.

Any changes to this process document will be achieved by consensus of the workgroup members. If proposed changes affect the policy memo, concurrence by representatives of the original policy memo signatories will be required.

<sup>1</sup>Centrally coordinated corporate sponsors/donors will be determined by the University/Industry Partnership Implementation Team. Centrally coordinated foundation sponsors/donors will be determined by the OSU Foundation, Sponsored Programs and Post Award Administration.