

Fellowship Awards from Private Foundations Stewardship Guidelines and Best Practices

The [Office of Foundation Relations](#) (OFR) is pleased to partner with faculty, colleges, and units to execute meaningful stewardship touch points with private foundations investing in The Ohio State University's educational and research mission. [Our team](#) supports all academic units, regional campuses, and the medical center. With a team of professionals versed in private foundation grantmaking, OFR specializes in prospect identification; relationship building (cultivation); proposal development (solicitation); and stewardship (ongoing engagement and impact reporting).

As a research fellow and principal investigator, you are well positioned to cultivate a strong relationship with the granting foundation, demonstrate the impact of their investment, and pave the way for future funding in support of your scholarship and research. The relationships and reputation you cultivate as a fellow may contribute to your success in securing additional external funding and cultivating research collaborations. The following guidelines were developed to support effective engagement with the foundation program officers and grant administrators associated with your grant award.

Best Practices

- Connect with the Director of Foundation Relations assigned to your college/unit early in the fellowship term to **identify effective stewardship activities** based on the foundation's distinct characteristics and your unique fellowship program. (Visit [the OFR website](#) and click a team member's name to view college/unit assignments.)
- **Participate in the activities and events developed for your fellowship cohort.** Utilize those opportunities to connect with program officers and other foundation staff members.
- **Cultivate a unique relationship with the program officer** associated with your fellowship program through regular communication, such as research updates, in between or in addition to required reporting.
- **Set reporting deadlines and reminders on your calendar.** It is the principal investigator's responsibility to ensure that required reports are submitted on time. Often, these reports are required before foundations will release continuation funding.
- **Stay ahead of delays and disruptions.** If meeting the reporting requirements is impeded for any reason, engage with the foundation as soon as possible to determine their preferred course forward.
- **Follow the publicity guidelines** included in the grant agreement. The granting foundation may require specific language when activities supported by the fellowship are referenced in journals, articles, or media.
- **Consider your OFR contact a resource and thought partner** as you take steps to deepen your relationship with the foundation. In addition to recommending specific stewardship strategies, OFR can review narrative report submissions, interpret publicity guidelines, and assist with general correspondence.

Required Stewardship

Required stewardship (a.k.a. reporting) are those activities that are required of the grantee (fellow), as defined in the terms of the grant agreement. Sponsored Program Officers (SPO) in the [Office of Sponsored Programs](#) (OSP) partner with faculty and staff to adhere to these requirements, supporting compliance and fiscal administration associated with grants and contracts from both public and private sponsors (i.e., nonprofit organizations, private foundations, corporations, and government agencies). This includes overseeing the creation of required financial reports, monitoring the approved use of funds, and accounting of expenditures. The name and contact information for the SPO affiliated with your college or unit can be found in the [SPO Directory](#), or under your grant award details in [PI Portal](#).

Recommended Stewardship

Fellows are encouraged to leverage support from the Office of Foundation Relations to engage the foundation beyond the required reporting outlined above. OFR can help you execute strategies that deepen your relationship(s) with foundation program officers, raise awareness of your research with other funders, and pursue additional funding from private foundations.

During the award term partner with OFR to:

- Send a message to the foundation expressing appreciation for the award and highlighting what you are looking forward to accomplishing with their support.
- Develop a public announcement of the award to feature on department websites, newsletters, or other media and share with the foundation. OFR has relationships with development and marketing teams at colleges and units and can help leverage their resources on your behalf.
- Document scientific papers and articles that reference grant-supported research. Ensure the foundation is appropriately acknowledged and the program officer receives a copy, accompanied by a personal note.
- Invite foundation program officers or leaders to events of interest. Lectures, conferences, workshops, or trainings offered by Ohio State and partners may be specific to the funded fellow or represent another area of interest to the foundation.
- Express thanks at the end of the fellowship term and share updates on your research and career trajectory.

Following the award term, partner with OFR to:

- Share progress on research supported by the fellowship with foundation program officers.
- Identify other funding available from the granting foundation or other private foundations.

Cultivating Additional Support

Support from private foundations is critical for research that is at the cutting-edge of discovery, leading to transformational change in respective fields. In 2019, giving from private foundations totaled over \$75 billion nationwide, with over 220,000 foundations giving more than 18 million grants to over 400,000 organizations. At Ohio State, approximately \$90 million in private grant dollars were awarded in 2019.

In addition to partnering with OFR to identify and pursue grant opportunities, faculty and researchers can build awareness with the foundation community by writing for [The Conversation](#), an independent, nonprofit publisher of commentary and analysis, authored by academics and edited by journalists for the general public. Supported by several private foundations, *The Conversation* features short articles (800-1000 words) by academics on timely topics related to their research. If interested, please view an [informational video about the publication](#) and contact [Jeff Grabmeier](#) for more information.

Office of Foundation Relations Contacts

Learn more about Foundation Relations and identify the team member that supports your college or unit by visiting [our website](#).