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Relationship Building Through Stewardship:

Best practices in saying thank you to help develop better relationships with foundations

Note for Examples 1 & 2: Sample templates were created using award amounts to determine the level of the partnership. This was simply to provide an easy to understand format, though you may wish to determine your partner levels in a more meaningful way (i.e. length of partnership, capacity to increase partnership, or some other priority level that makes sense for your organization).

Example 1: Stewardship Schedule

MONTH / Stewardship Activity Note that these are in addition to any of the requirements of the grant agreement, such as interim & final reports	Partner Level 1: \$500-10k	Partner Level 2: \$10k-\$50k	Partner Level 3: \$50k+
JANUARY			
Annual Report w/ short personal note	X	X	X
FEBRUARY			
Thank you / engagement calls		X	X
MARCH			
Invitation to annual fundraiser/gala/etc.	X		
APRIL			
Spring stewardship touch (share story & connect it to their partnership)	X	X	X
Invitation to next month's recognition event		X	X
MAY			
Foundation/Corporate Partner recognition event at shelter		X	X
JULY			
Mid-year donor report; personalized	X	X	X
SEPTEMBER			
Fall stewardship touch (impact stories)	X	X	X
NOVEMBER			
Thanksgiving cards; personalized		X	X
DECEMBER			
Holiday cards	X	X	X
Calendar / planner / address labels (gift)	X	X	
End of year thank you video	X	X	X

Example 2: Grant Recognition Plan

Grant Award Amounts / Determine Benefit Levels Amount can be one-time grant award or collectively over one year's time.	Recognition / Benefits for Activation There may be other requirements that are unique to a foundation's guidelines and/or agreements. Read closely.
\$500+ Award	Handwritten thank you & printed acknowledgement letter with tax language
\$5k+ Award	^Same as \$500+, and... Facebook post announcing award and thanking the foundation
\$10k+ Award	^Same as \$5k+, and... Press release announcing award and thanking foundation
\$25k+ Award	^Same as \$10k+, and... Thank you blurb on lobby televisions
\$50k+ Award	^Same as \$25k+, and... Logo or name on website partnership page
\$100k+ Award	^Same as \$50k+, and... Thank you call or personal letter/email from Executive Director/CEO/Founder Annual Meeting recognition and invite Other unique benefits to be discussed on an individual basis could include: <ul style="list-style-type: none"> • Mention in magazine, online, or in annual report • Banner at event • Display of plaque or recognition piece at shelter for period of time • Naming of program or community event • Naming of place (i.e. P&C Dog Park)

Example 3: List of Stewardship Ideas

In Person:

- Welcome to visit your center
- Offer to stop by for quick intro – bring donuts or cookies
- Ask to meet for coffee or lunch
- Invite to your events
- Hold “exclusive” events just for them
- Ask to tour their facilities to learn more about them
- Invite to volunteer

Tokens of Appreciation:

- Partner recognition awards
- Send annual calendar
- Handwritten thank you cards
- Holiday cards (not just for traditional holidays)
- Birthday cards (or other special events)
- Thank you call from Executive Director/CEO/Founder
- Short and sweet email check-ins (how was your trip/event?)
- Thank you videos
- Testimonials from clients being helped by their support

Deeper Engagement:

- Meaningful phone calls to get to know them better (NOT to ask for \$)
- “I’d love to get your feedback/ expertise...” (potential new program/challenges/event idea)
- “I want to share this success story that you made happen”
- Before/after grant transformational story
- Interim and final reports (not *just* a report, but an opportunity to connect)

Keeping in the Loop (aim for quarterly):

- Newsletters and magazines
- Annual reports
- Mid-year donor report
- Programmatic updates
- Impact reports
- Photos
- Stories
- Add to email or e-newsletter list
- (Also, follow their newsletters, social media, etc. so you can acknowledge or congratulate their achievements as well)

Opportunities for recognition:

- Website
- Social media
- Naming opportunity for lobby, adoption rooms, clinic, etc.
- Event signage
- Magazine ad
- Press release
- Annual report
- Annual meeting
- Other media

