Best Practices for Stewarding Scholarship Donors

Presented by the Undergraduate Student Success Initiative’s Financial Aid & Scholarships Sub-Committee

April 13, 2021
Agenda

• Welcome and Introduction
  • Toni Doolen, Ph.D. [she/her/hers], Dean, OSU Honors College & Professor, School of Mechanical, Industrial, and Manufacturing Engineering

• Donor Engagement Lifecycle and Donor Continuum
  • Pam Powell, Associate Director of Stewardship
  • Pam.Powell@osufoundation.org

• Importance of Donor Stewardship
  • Blythe Kneedler, Stewardship Coordinator
  • Blythe.Kneedler@osufoundation.org

• Tools and Resources to Support Donor Stewardship
  • Colleen Conniff [she/her/hers], Director, OSU Scholarship Office
  • Colleen.Conniff@oregonstate.edu

• Unit Donor Stewardship: An Example
  • Kevin Stoller [he/him/his], Director of External Relations and Operations, OSU Honors College
  • Kevin.Stoller@oregonstate.edu
OSU Foundation Stewardship

• Stewardship Team: Deborah Correa, Pam Powell, Blythe Kneedler and Andy Arthur
• Goal = well-stewarded (happy) donors
Donor Lifecycle
Donor Motivation (Donor Survey – Summer, 2020)

• What contributed to your sense of satisfaction in making this gift?

• If you would like to expand on your answer, please do so here.

• What is the most meaningful way you have ever been thanked for a gift to OSU or any organization and why?

• What is the most meaningful way you have ever been recognized for a gift to OSU or any organization and why?

• What inspired your biggest gift to OSU?
Donor Motivation

Questions: Satisfaction, meaningful thanks/recognition, inspiration
Donor Motivation (Donor Survey – Summer, 2020)

• What contributed to your sense of satisfaction in making this gift?

  • “Knowing we have truly helped someone in their very expensive quest for an education and becoming a contributing member of our society.”

  • “I believe in a future with educated young people. OSU has some outstanding students, and we like to help them to get their education, so they can make the world a better place.”

  • “I chose to give because I have always felt I have had success in in my lifetime and adventures. I hope my scholarship helps someone else begin their “dream” come true!”

  • “Knowing I was helping an individual receive a college education who may not have been able to afford on their own. Also, helping the University obtain what it needs to provide a world-class education.”
Donor Motivation (Donor Survey – Summer, 2020)

• What is the most meaningful way you have ever been thanked for a gift to OSU or any organization and why?

  • “Hearing from the faculty person and students, who provided updates on impact of our gift.”

  • “Communication from person or persons or group benefiting from gift; especially from recipients of the Presidential Scholarship we sponsor. Why? because one knows that the gift meant something positive and made an impact.”

  • “Recipient sending appreciation email explaining use and impact of donation.”

• Themes: help students, give back, hearing from recipient/impact
OSUF Resources

• CRM – OSUF Database
  • Contact information maintained
  • Documents interactions with alumni/donors/friends

• Financial Edge – Financial Information
  • Account balances, etc.
  • Gift agreements
  • Work with Business Centers

• Unit Stewardship Report (aka Gift Journal)
  • Identifies gifts by unit (i.e., college)
  • Work with Development Officers
  • Request access: https://service.osufoundation.org/support/catalog/items/51

• Need help documenting?
  • Contact reports
  • Scan in materials sent to donors and we will get it added to CRM!
Tools and Resources to Support Donor Stewardship

• Sharing scholarship recipient information with donors
  • FERPA requires that we obtain prior written consent from students before sharing non-directory information with third parties, including scholarship donors
    • OSU does not consider scholarship award information to be “directory information”
  • Either general consent to share award information or more specific consent to share information in a specific way or instance may be requested
  • If a student has not provided consent, anonymized information may be shared with donors
Tools and Resources to Support Donor Stewardship

• **OSU ScholarDollars**, Oregon State’s online scholarship management system, includes tools that support donor stewardship
  • These features are available for any scholarship awarded through OSU ScholarDollars
  • Information for over 1,400 scholarship donors has been loaded to the system and linked to the appropriate scholarship accounts
  • Colleges, departments, and programs also may set up separate processes to collect student-submitted stewardship materials outside of ScholarDollars
Tools and Resources to Support Donor Stewardship

• OSU ScholarDollars offers an optional feature to request thank you letters or other stewardship materials from scholarship recipients
  • The request for consent to share award information is incorporated into the thank you letter process
  • Customized templates can be created
  • Recipient, award, and/or donor information can be automatically inserted into thank you letters
  • Review and approval of draft thank you letters and other submitted materials by OSU staff can be required
Tools and Resources to Support Donor Stewardship

• Recipient thank you letters can be printed or exported as pdfs from OSU ScholarDollars

• Thank you letter responses also can be exported in spreadsheet format to create external documents
Tools and Resources to Support Donor Stewardship

• ScholarDollars also supports donor stewardship through features that assist scholarship administrators with managing their accounts:
  • Create customized applications to request information that is not available in the university’s records
  • Apply eligibility requirements and awarding rules to candidate pools
  • Review scholarship budgets and fund utilization
  • Monitor the status of scholarship awards
  • Track the submission of stewardship materials
Tools and Resources to Support Donor Stewardship

• OSU ScholarDollars is available through the link on the OSU Scholarship Office’s website
  • https://scholarships.oregonstate.edu/scholardollars

• All current OSU faculty and staff who have responsibilities related to scholarship administration and/or donor stewardship are eligible for a ScholarDollars user account
  • An account may be requested by contacting the Scholarship Office at ScholarDollars@oregonstate.edu
Unit Donor Stewardship: An Example

• Objectives and goals
  • Provide meaningful and diverse opportunities for supporters and prospective supporters to learn more about the Honors College and engage with honors students.
  • Offer current Honors College donors and supporters opportunities to deepen engagement with the college.
  • Celebrate Honors College supporters, connect them with students, and recognize their contributions to the college's strategic priorities and vision.
Unit Donor Stewardship: An Example

• Roles and responsibilities
  • Maintain relationships with your OSU Foundation and OSU Alumni Association contacts
  • Know your communications team
  • Scholarship administrators are a part of the process
Unit Donor Stewardship: An Example

The donor lifecycle
• Recruit/Inspire
• Learn
• Engage
• Ask
• Thank

Tracking success
• Discovery
• Interest
• Engagement
• Participation
• Ownership
Unit Donor Stewardship: An Example

• **Recruit/Inspire**
  • Honors College social media
  • Honors students at OSU events and in OSU-wide publications
  • "Portal" events and happy hours

• **Learn**
  • Electronic and print newsletters
  • Research Showcase events
  • "Dean and Friend" lunches
  • Meetings with dean and/or development officer
Unit Donor Stewardship: An Example

• Engage
  • Hosting Honors College event
  • Honors College leadership groups
    • Board of Regents
    • Parent and Family Leadership Circle
    • Alumni Leadership Circle
  • Honors College career connections
  • Invite to contribute to strategic planning

• Ask
  • Offer high level of engagement and impact
  • Day of Giving challenge gifts
  • "Packaged" gift opportunities
Unit Donor Stewardship: An Example

• Thank
  • Personalized, hand-written thank you notes from the dean or an Honors College student
  • Annual scholarship donor mailings
  • Arrange meetings with scholarship recipients
  • Recognize membership in leadership groups
  • Highlight contributions in publications
  • Nominate for OSUAA awards
Unit Donor Stewardship: An Example

- **Outcomes**
  - Growth in leadership groups
  - New scholarship programs
  - Programmatic benefits
  - Increases in fundraising

![Graph showing Honors College Fundraising Progress from 2017 to 2021*]
Additional Resources

• Scholarship Support Resources for Faculty and Staff
  • Available through the Faculty & Staff link on the Scholarship Office’s website
Additional Resources

• Scholarship Support Resources for Faculty and Staff
  • *Best Practices for Engaging and Stewarding Donors who Contribute to Scholarship and Student Success Support Funds*

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**Stewarding Scholarship and Student Support Funds**

- Best Practices for Stewarding Scholarship Donors Workshop
  - Tuesday, April 13, 2021 from 3:00 pm to 4:00 pm
  - Join via Zoom at [https://oregonstate.zoom.us/j/94858042885?pwd=elkrM3N2M1NCc1Z6UTJvdlNqZy...](https://oregonstate.zoom.us/j/94858042885?pwd=elkrM3N2M1NCc1Z6UTJvdlNqZy...)
  - Password: steward

- Best Practices for Engaging and Stewarding Donors who Contribute to Scholarship and Student Support Funds (Undergraduate Student Success Initiative)
  - **Stewardship Timeline**
  - Managing Donor Relations Using a Continuum Model (OSU Honors College)
  - Gift Acknowledgement Summary (OSU Foundation)
  - Sample Donor Tax Receipt (OSU Foundation)
  - Sample Donor Thank You Letters (OSU Foundation)
  - Sample Student Recipient Report (OSU Foundation)
  - Sample Scholarship Endowment Report (OSU Foundation)
  - Sample Student Support Fund Impact Report (OSU Foundation)
  - **IT Tools and Resources for Stewardship (OSU Foundation)**
Questions?

• We’re here to help - Please contact us!
  • Donor relations and stewardship (OSUF)
    • OSUF Stewardship Team
    • OSUFDonorRel@osufoundation.org
    • 541-737-4218
  • Scholarship administration (OSU)
    • OSU Scholarship Office
    • scholarship.office@oregonstate.edu
    • 541-737-1125
THANK YOU!