Best Practices for Stewarding Scholarship Donors

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

November 9, 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, Senior Coordinator, Stewardship
  • 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: Director, Pam Powell, Blythe Kneedler, Andy Arthur and Brianna Tubbs
• Goal = well-stewardred (happy) donors
Donor Lifecycle

- Recruit/Inspire
- Learn
- Engage

DONOR ENGAGEMENT LIFECYCLE

- Ask
- Thank
- Repeat
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

**FERPA**
Family Educational Rights & Privacy Act
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 prospective supporters to learn more about the Honors College and engage with honors students.
  • Offer current Honors College donors and supporters opportunities to deepen involvement with the college and sense of connection.
  • Celebrate Honors College supporters, raise their visibility to students/staff/faculty, and recognize their contributions to the college's strategic priorities and vision.
Unit Donor Stewardship: An Example

• Roles and responsibilities
  • Build relationships with OSU Foundation and OSU Alumni Association
  • Involve the communications team
  • Scholarship administrators are a part of the process
  • Coordination of different elements of stewardship key
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
  • Host 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 and/or an Honors College student
  • Annual scholarship donor mailings
  • Arrange meetings with scholarship recipients
  • Recognize membership in leadership groups
  • Highlight contributions in publications
  • Awards
Unit Donor Stewardship: An Example

• Outcomes
  • Growth in leadership groups
  • New scholarship programs
  • Programmatic opportunities
  • Increases in fundraising

Honors College Fundraising Progress
Unit Donor Stewardship: Discussion
Additional Resources

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

Scholarship Support Resources for Faculty and Staff

These materials have been developed and compiled to assist Oregon State University and Oregon State University Foundation faculty and staff with the creation, administration, awarding, and stewardship of scholarship and student support funds.
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*

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=elkgM3N2M1NCc1Z6UTJvdiNqZy...](https://oregonstate.zoom.us/j/94858042885?pwd=elkgM3N2M1NCc1Z6UTJvdiNqZy...)
    - 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)
We’re Here to Help - Please Contact Us!

- General donor relations and stewardship (OSUF)
  - OSUF Stewardship Team
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  - 541-737-4218
- Pam Powell
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THANK YOU!