

Stewardship Processes and Task List Timeline

Process/Task	Timeline for Completion	Staff/Faculty Responsible
Recruit engagement and donors	Ongoing	OSUF, campus units
Share engagement and donor stories	Ongoing	OSUF, campus units
Donor engagement in programs and events	Ongoing	OSUF, campus units
Soliciting donors in consultation with OSUF	Ongoing	OSUF, campus units
Review proposed gift criteria	Ongoing	Deans, program directors
Drafting, completing, and distributing gift agreement	Ongoing	OSUF
Gift acknowledgement with tax receipt	Immediately following gift	OSUF
Donor thank you	Immediately following gift	OSUF, campus units
Donor recognition event, website, society, publications	Ongoing	OSUF, campus units
Add award information to ScholarDollars based on gift agreement	Account created/revised	Scholarship administrators
Awarding funds	Annually	Campus units
Request recipient approval to release award information	Ongoing	OSU ScholarDollars
Review student-written letters and profiles for appropriateness	Ongoing	Scholarship administrators
Share award recipient information with donor/steward (in FERPA compliance)	Ongoing	OSUF, campus units
Student support fund donor impact reports	Spring/Summer	OSUF
Fund utilization audit	Ongoing	OSUF, campus units