

# Student-Centric Scholarship Program Development Workbook

*A Resource for Working with Development Officers and Donors*

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## ABOUT THIS WORKBOOK

We at Students First Consulting talk to a **lot** of scholarship providers. **A lot.** And many of those scholarship providers express challenges in working with Development team members and donors. They're often stuck answering questions such as:

- Who's in charge of communicating with prospective donors? Who's the very *best* person to communicate with prospective donors?
- Is the information being shared with prospective donors about scholarship programming current or being accurately described?
- How do we prevent making promises to donors that make scholarship administration difficult or unsustainable?
- How do we create scholarship funds that are sustainable for our administrators, impactful to students, and delightful to donors?

This resource is intended to help improve the scholarship development process *and* prioritize students in doing so. And it's chock-full of resources that you can use with Development team members, donors, and other stakeholders.

You're an incredible advocate for students and their needs! And donors are a way to help meet those needs. They want to have as great an impact on students as possible. With their passion and your expertise, you can co-create a program that has positive outcomes for both students *and* donors.

## SETTING THE STAGE

### Why offer scholarships?

It's a great question, and hopefully one that you and your organization have considered (and even documented your responses to!).

In general, scholarships can help to achieve two important purposes:

- To provide students the financial resources--and, sometimes, additional supports--that enable them to gain access to and persist through college
- To allow generous donors to help students gain access to and persist through college

How do these purposes resonate with you and those at your organization? Is it worthwhile to jointly explore this topic together? If so, use the questions below to share, brainstorm, and hopefully come together on your "Why?"

### QUESTIONS FOR REFLECTION:

**Why does your organization offer scholarships?**

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**What kind of change are you hoping to help make possible for students?**

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**What outcomes would you love to be able to report back to donors?**

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*If you need more help on developing your program “Why?,” download our [Program Strategy Workbook](#) or reach out to us about our Program Strategy services.*

## WHY STUDENT-CENTRIC SCHOLARSHIPS?

Students are experts on their needs. Unfortunately, donors and Development staff are often very far removed from students. Many are decades out from having been a college student, and even knowing one!

It is an inequitable practice to create scholarship and other student-focused opportunities without students’ involvement.

**Scholarship staff must be students’ advocates, working to educate donors using what they know about students they serve.**

As many providers likely know, here are some hallmarks of student-centric scholarships:

- Understand the experiences and needs of the students you hope to serve
- Employ the principles of trust-based philanthropy
- Offer holistic support services to scholars
- Include students and scholars in your program’s decision-making processes
- Practice continuous quality improvement through ongoing data collection, evaluation, and program revision

## WHO SHOULD LIAISE WITH DONORS?

Who should work with donors, Development or Scholarships staff? Only you and your team can decide what's right for you. However, **we have seen that Scholarships staff and others working directly with students are the best at representing their needs and interests.**

### QUESTIONS FOR REFLECTION:

*What information is needed by Development staff to understand scholarship program administration and the students you serve?*

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*What information is needed by Scholarship staff to understand new donor processes and requirements of Development staff?*

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*How can Development and Scholarship staff stay informed about each other's capacity, changing processes, opportunities, and student needs?*

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*Which teams and team members will take on which scholarship development tasks? Use this table to inspire you.*

| Task   | Lead                | Support             | Informed            |
|--|---------------------|---------------------|---------------------|
| Responding to initial donor interest             | Development Staff   | Scholarship Manager |                     |
| Sharing scholarship program and fund information | Scholarship Manager | Development Staff   |                     |
| First donor meeting                              | Development Staff   | Scholarship Manager |                     |
| Scholarship criteria draft                       | Scholarship Manager | Scholarship Staff   | Development Staff   |
| Revisions to criteria and future meetings        | Scholarship Manager | Scholarship Staff   | Development Staff   |
| Create fund agreement and official welcome       | Development Staff   |                     | Scholarship Manager |

|   |                     |                     |                   |
|---|---------------------|---------------------|-------------------|
| Fund administration and succession planning | Scholarship Manager | Scholarship Staff   | Development Staff |
| Ongoing engagement                          | Scholarship Staff   | Scholarship Manager | Development Staff |

***On what schedule will you meet and/or communicate? Through which channels?***

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***How will we stay centered on students and their needs?***

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## HOW SHOULD YOU LIAISE WITH NEW DONORS?

Do it in a student-centric way! Make sure your communications are focused on students, as they're the reason for your work and for donors' generosity. Early connections with donors also provide the opportunity to clearly share with them your program strategy, which will help determine if the donor is a good fit for your organization.

***This is a great time to have a meeting with your Development and Marketing staff to update your organizational documents with new student data, program impact statements, and/or administrative changes.***

[RESOURCE: Sample New Scholarship Donor Email](#)

[RESOURCE: Oregon Community Foundation's Scholarship Brief](#)

[RESOURCE: Donor Meeting Guide](#)

## SETTING EXPECTATIONS WITH STAFF AND DONORS

We encourage you to be very explicit with the Development staff and donors about what to expect from you and from students. For example, share up front a plan for what they will receive from you and when. **By appropriately setting expectations at the outset, you can avoid the unexpected requests - and even say no if needed!** Use language such as the below as needed.

***What to expect from our Scholarships team and when:***

- About scholarship administration: Please see your fund agreement and scholarship fund guide for full details on fund statements, gifts, and fees. Any requests for changes to fund management or scholarship criteria will need Board approval and will need to be submitted to Scholarships staff 30 days before the next Board meeting.
- About scholarship recipients: We will share with you what we learn from students, including aggregate data and, as possible, information about your specific recipients. We will also share student stories, including those that are representative of your and others' scholarship recipients. We aim to provide this information in January and July of each year.

***What to expect from students, including your scholarship recipients:***

It's important to keep in mind that students are busy people too (often busier than you or me!). As they're available, we will invite you to participate in events with them. We'll also pass along information they share with us about their education and progress. Occasionally, we may have the opportunity for you to dive deeper into their lives and experiences, through events such as campus tours or volunteering at scholar study events. Again, this depends on their availability and desire to connect with you, but we will certainly let you know if these opportunities arise.

**QUESTIONS FOR REFLECTION:**

***What can Development staff expect from your Scholarships team? From the students you serve?***

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***What can donors expect from your Scholarships team? From the students you serve?***  
*(And you probably know best among those at your organization - unless you have students directly involved, which is a great idea!)*

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## EDUCATING DONORS

Sharing education and student-related information with donors starts in your first contact with them and continues throughout the donor engagement relationship. At the beginning, donor education might be centered around students in general and/or their target recipients, including:

- Addressing any biases or assumptions that may be present
- Helping the donors to understand barriers specific to their target recipient group
- Key supports that could be valuable “add-ons” to the scholarship fund

As time goes on, the education you provide may become more specific regarding the needs of their current scholars or priority population, or it may focus on trends in your community or in financial aid and higher education more broadly. Here are ideas for sample data points and information to share.

- Information about your applicants and recipients from:
  - Responses to application questions
  - Documentation collected from them, including from their financial aid information
  - Responses to post-award form or survey questions
  - What they’ve told you in person or correspondence
- Data points from resources such as:
  - [The National Student Clearinghouse Research Center](#)
  - [The National Center for Education Statistics](#)
  - [The Institute for Higher Education Policy](#)
  - [The Institute for College Access and Success](#)
  - [The Lumina Foundation](#)
  - [The Education Trust](#)
  - [The U.S. Census Bureau](#)
  - [The Opportunity Index](#)
- Information about college students around the country:
  - The real picture of [today’s college students](#)
  - [College costs](#) and [unmet needs](#), including [how it varies by student population](#)
  - [Gaps in opportunities and achievement](#) among student populations

We also encourage you to use data in organization or program marketing and education materials.

### QUESTIONS FOR REFLECTION:

***What (internal) data points on your applicants and recipients are best to share?***

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*What (external) data points on students in your community are best to share?*

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*Where will you find that data?*

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*What stories from your applicants and recipients are best to share?*

## REPORTING OUT TO DONORS

Donor relationships are the responsibility of organizational staff—both Scholarship and Development—to manage. **It is not a student's responsibility to manage a donor relationship.** Do not set the expectation to the student or donor that engagement is required. Do not penalize students for not providing information to your donors.

Below are ways to report to donors (based on capacity and the expectations you've set). Not all of these need to happen via written reports; they can be provided via other channels. More importantly, they let donors know how their scholars are doing.

- **New Scholars:** Create a report of scholarship recipients (together or by individual scholarship) that includes quotes from their application forms, their schools, desired areas of study and goals, and other compelling information.
- **Current Scholars:** Annually or each semester, combine quotes from student reports or emails to share how they're doing and how the scholarships have impacted them. Include schools, current majors, years in school, and other data that might help the donor keep track of where students are on their educational journeys.
- **Donor Meetings:** If students are interested and available, offer to set up meetings between the donor and recipient(s). Be present at the meeting, if possible, to assist in navigating the conversation.



- **Scholarship Newsletter:** Send an annual scholarship newsletter to all current and prospective scholarship donors, committee members, and other key stakeholders. Include scholarship applicant and recipient data, highlight a few students, and share any recent educational reports or data on students' needs and circumstances.

[RESOURCE: Thank You Letter from Alumnus](#)

## LONG-TERM DONOR ENGAGEMENT

Once the new scholarship is official and donors have ended their new scholarship development process with your team, there are still a few future touchpoints to be planned:

- **For Scholarships Staff:**  
At minimum, have one check-in meeting per year, to ensure that donors continue to feel that their desired impact is being achieved. If not, adjustments in criteria, opportunities for involvement, or sharing student feedback can be planned. Just keep in mind organizational values as well as established policies and procedures.
- **For Scholarships and Development Staff**
  - Succession planning for donors' scholarship funds: What will happen to their fund after death? Should it sunset, transition to staff management, or will a new family member become the contact?
  - Potential legacy gifts (to the Scholarship fund or other funds held at the organization)
  - Organization-wide involvement
    - Invitation to events and learning opportunities
    - Opportunities to volunteer and/or meet staff, students, and local nonprofits
    - Education and scholarship-specific newsletters or periodic updates