

THE OSU FOUNDATION DONOR ENGAGEMENT PROCESS WITHIN THE CONTEXT OF EXTENSION

IDENTIFY

CFAES ADVANCEMENT

- Work with the Advancement Development team to generate lists of alumni and donors from The Advancement System (TAS), which is the comprehensive University system used to process gifts; track stewardship efforts and affiliations; keep biographic information up to date; and market to OSU audiences.
- Converse with Extension professionals and volunteers about optimal ways to approach certain individuals, families, companies and foundations (may request introductions and attendance from professionals and/or volunteers).
- Facilitate discussions about engagement capacity in select regions and counties.
- Attend select county events/meetings to foster connections and represent CFAES.

EXTENSION PROFESSIONALS & VOLUNTEERS

- Educators & Staff
 - Initiate conversations with CFAES Advancement about needs, goals, opportunities and events in counties.
 - Collaborate with CFAES Advancement when research is being conducted on potential partners and local capacity.
 - Distribute information/post literature about ways to support Extension through the OSU Foundation.
 - Follow up on information shared by supporters about their giving interests.
- Volunteers
 - Consider and self-identify personal interests in deepening engagement with Extension through the OSU Foundation.
 - Serve as community advocates for philanthropy in Extension.
 - When appropriate, share insights on current or potential partners who may be open to discussing other ways to support OSUE.

QUALIFY

- Have conversations with identified individuals, families, corporations and foundations.
- Learn about their backgrounds, the type of relationship they have with OSUE and their ties to other philanthropic entities.
- Discuss how they want to be involved with OSUE (volunteer, well-informed, etc.)
- Ask if they are open to being a donor.

- Educators & Staff
 - When appropriate, communicate updates on thoughts, ideas and levels of engagement of identified prospects.
 - Aid in trust-building by sharing a consistent message about priorities and the legal obligations of the OSU Foundation to comply with donor intent.
 - Train lead volunteers on the basics of donor engagement as expressed here and by the OSU Foundation.
- Volunteers
 - Learn about local philanthropic goals.
 - Ensure consistency in messaging.

CULTIVATE/
OPEN

NEGOTIATE/
CLOSE

STEWARD

CFAES ADVANCEMENT

- Learn about what is important to them.
- Share information about relevant priorities and needs in OSUE.
- Explore meaningful ways to deepen their engagement with OSUE. Consider if:
 - Service on committees or advisory councils may pique their interest?
 - Personal conversations with CFAES leadership could raise their sights about an investment?
- Agree on appropriate next steps.

- Finalize agreement on impact, timing and methods of giving.
- Learn donor's stewardship expectations.
- Work with internal partners to craft and revise gift agreement.
- Ensure attendance of all necessary individuals at the gift closing/signing.
- Appropriately file signed documents.
- Begin implementing stewardship plan.

- Send thank you letters.
- Craft and send endowment reports, when required.
- Execute other agreed upon stewardship activities (e.g. invitations to select events, participation on boards and councils, etc.).

EXTENSION PROFESSIONALS & VOLUNTEERS

- Educators & Staff
 - Inform CFAES Advancement and prospective partners about identified needs and priorities.
 - Develop case statements on the potential *impact* of transformative gifts.
 - Participate in select conversations.
- Volunteers
 - Share perspectives on programming needs and contribute to visioning.
 - Ensure consistency in messaging.

- Educators & Staff
 - Express gratitude and specific impact of gift to donor.
 - When appropriate, disseminate acquisition of philanthropic investments as examples within community.
- Volunteers
 - Work with the Extension professionals to determine appropriate ways to thank the donor.
 - When appropriate, coordinate with Extension professionals to share news about gifts to other audiences, namely lead volunteers.

- Educators & Staff
 - Contribute to impact reports.
 - When appropriate, share updates with the donor and CFAES Advancement about program outcomes and use of funds.
- Volunteers
 - Help Extension professionals collect impact stories and statements of gratitude.
 - Work with Extension professionals to learn appropriate procedures regarding use of funds and programming.

OFFICE OF ADVANCEMENT

advancement.cfaes.ohio-state.edu



THE OHIO STATE UNIVERSITY

COLLEGE OF FOOD, AGRICULTURAL,
AND ENVIRONMENTAL SCIENCES

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