

Students and Donors Benefit when Silos Disappear at your Institution

How to break down barriers between the Student
Financial Aid and Philanthropy functions

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Lakehead
UNIVERSITY

External
Relations



Presentation Overview

Where we started

- Communication breakdown
- Learning objectives
- Definitions of roles
- The cycle
- Case study
- Broken communication and the cycle

Where we have gone

- Our committee
- The new cycle
- Case study
- Our policy

Communication Breakdown





Learning Objectives

- Demonstration of best practice in procedures and communication between departments
- Development of Student Financial Aid Policy
- Demonstration of benefits to students and donors when siloes are broken down.



Role Definition

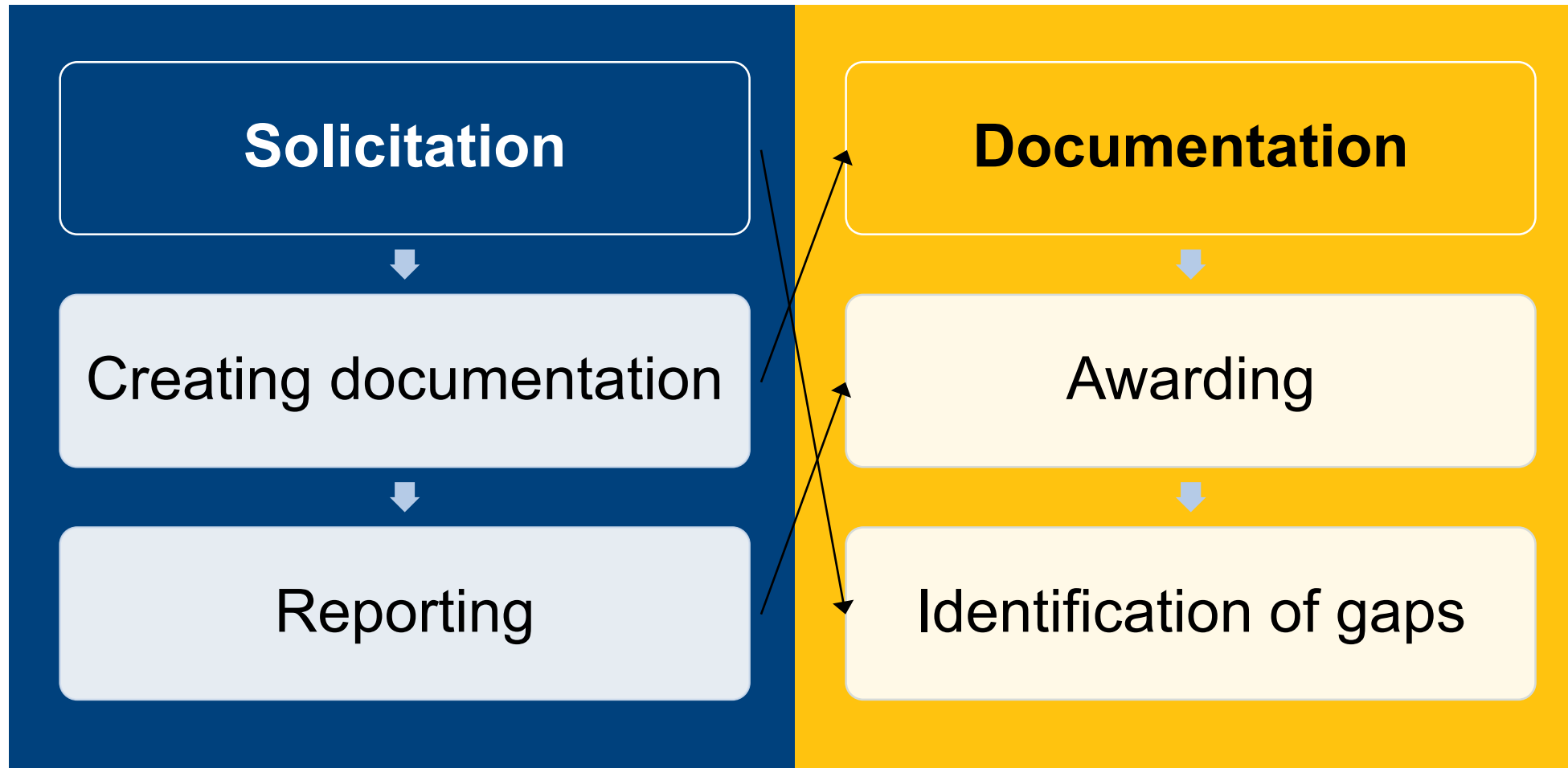
Philanthropy

- Engagement / Relationship building
- Fundraising
- Reporting

Student Awards and Financial Aid

- Criteria matching
- Expending funds
- Identifying gaps

Old Cycle





Case Study: Old Method

- Communication with a donor and set criteria as donor had \$20,000 plus, \$10,000 indefinitely thereafter.
- Criteria were very limiting and outdated.
- Lots of back and forth.
- Legal department intervened on best course of action.
- Not informed at onset for correct conversation.

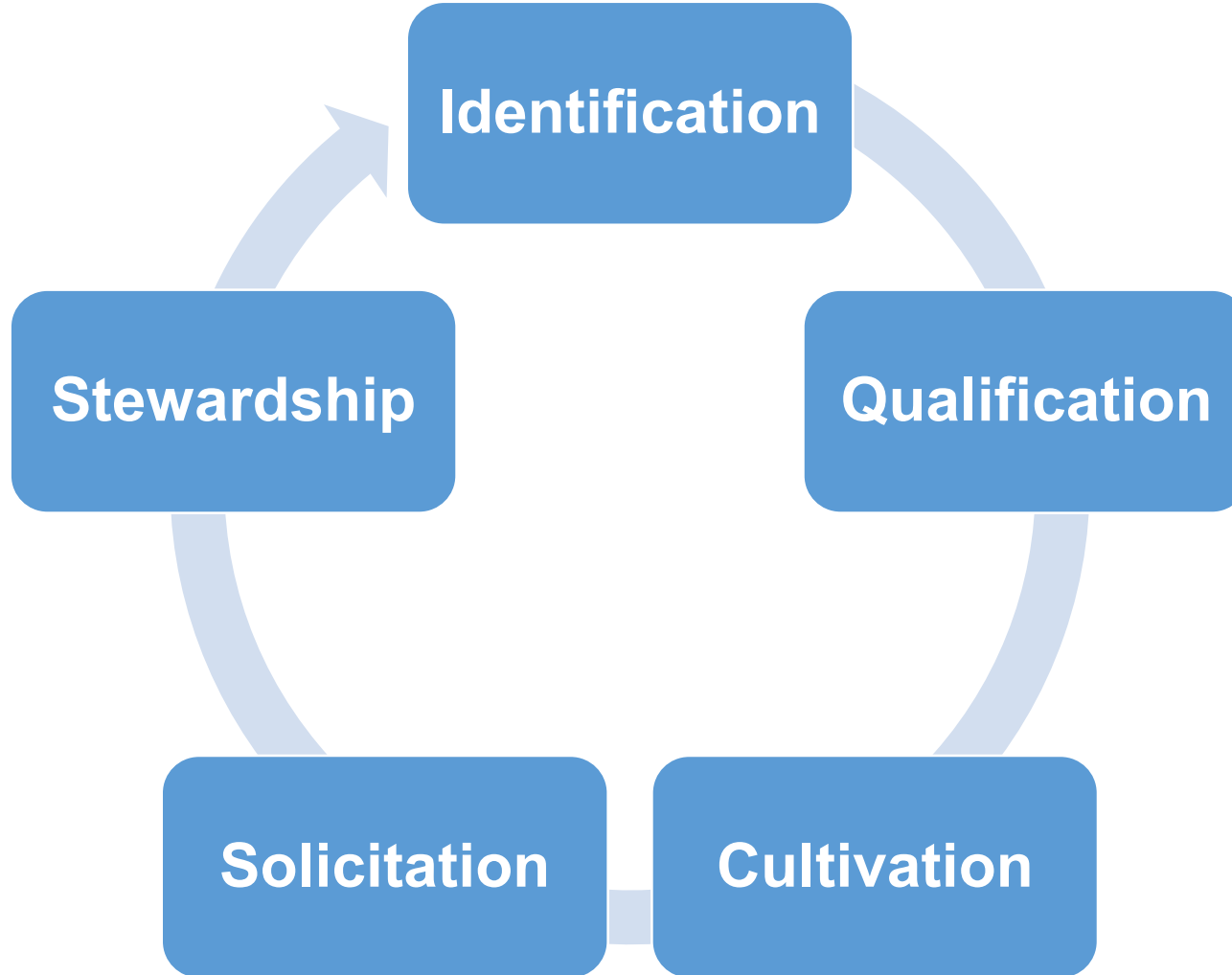


Issues with Old Cycle

- Broken communication.
- Stakeholders brought together
- Role learning and intersection amongst the stakeholders
- Aim was to benefits students and to relieve donor frustrations.

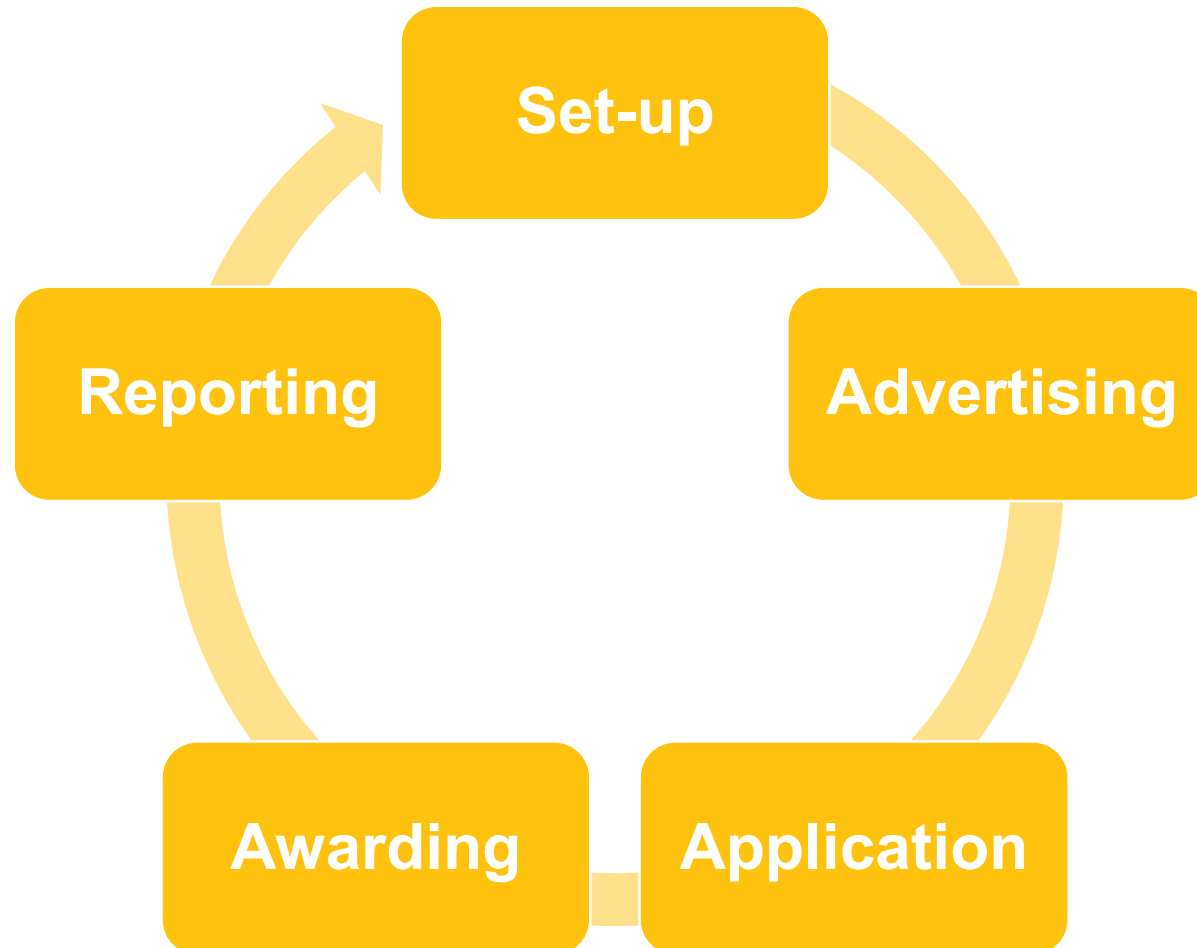


Building The Collaborative Cycle





Building The Collaborative Cycle CONT'D

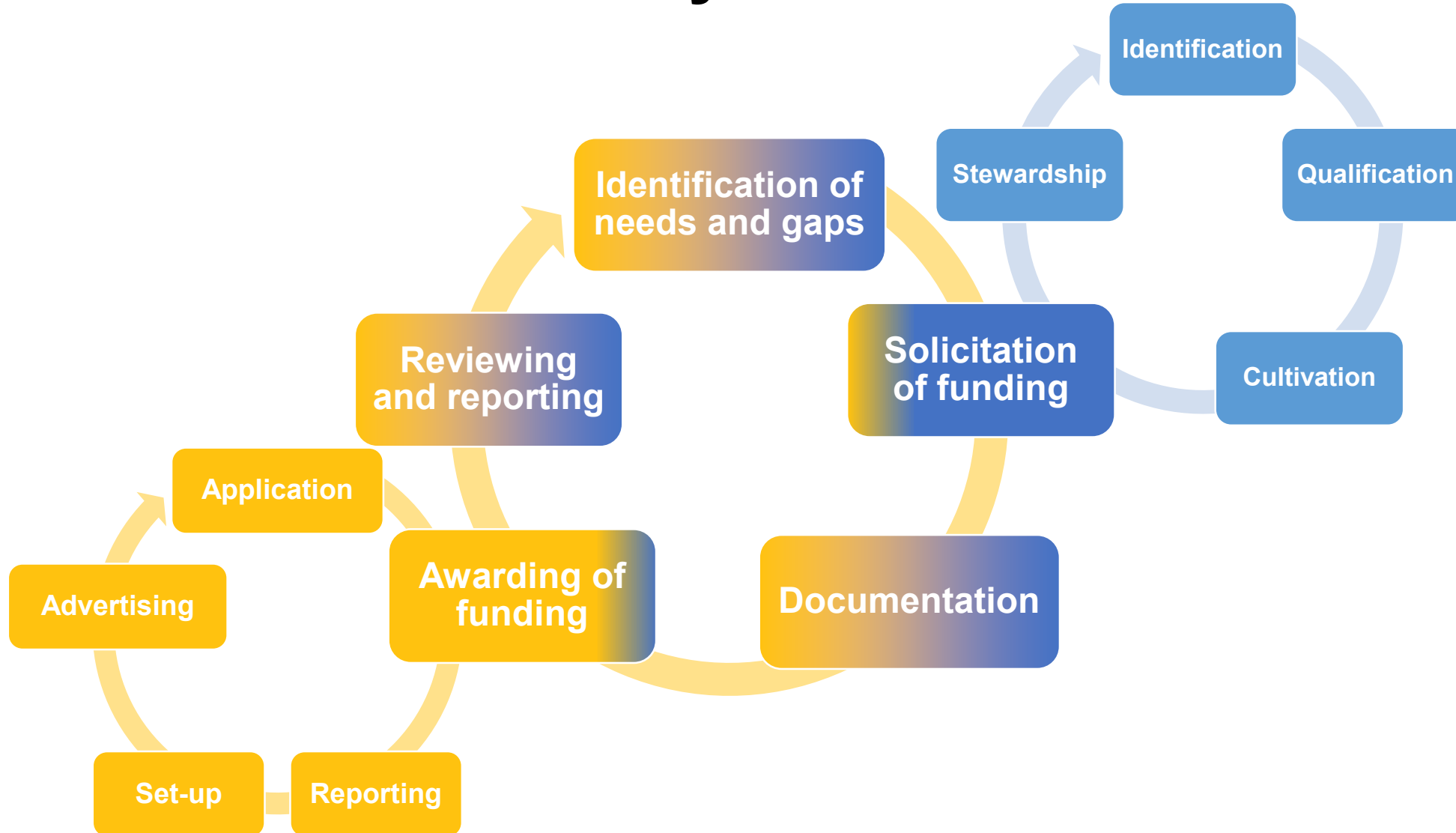




Building The Collaborative Cycle: Committee

- Student Awards and Financial Aid
- Graduate Studies
- Trust and Endowments
- Annual Fund and Alumni Engagement
- Philanthropy

The Collaborative Cycle





Case Study 1: New Method

- Major donor considered changing all awards to payout as a result of provincial changes.
- Student loan program created “Free Tuition”.
- Committee provided access to professionals to speak directly to donor.
- Reconsidered after discussion.



Case Study 2: New Method

- Correct communication to have correct conversation with donor
- Gender-specific request.
- Easily flowed through process with awarding in every year since inception.

Previous Policy





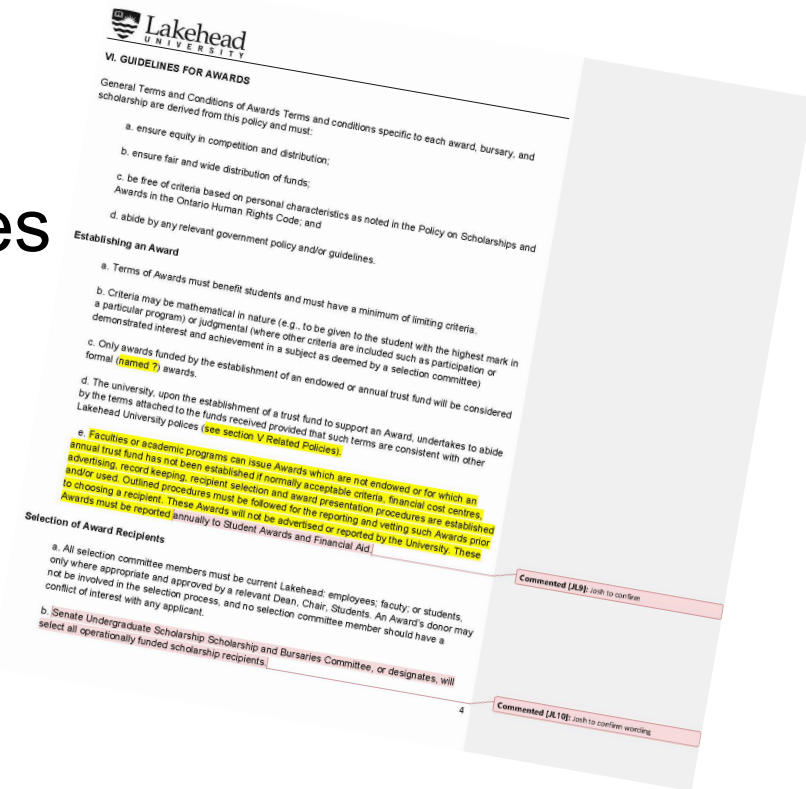
The Policy

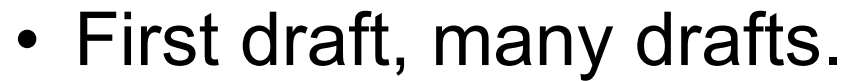


The Policy



- Review of best practices.
- Visit institutions and discuss processes
- Conceptualized ideas

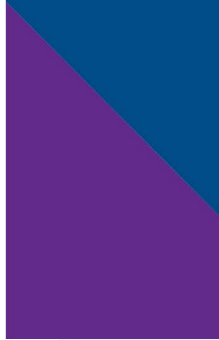




The Policy



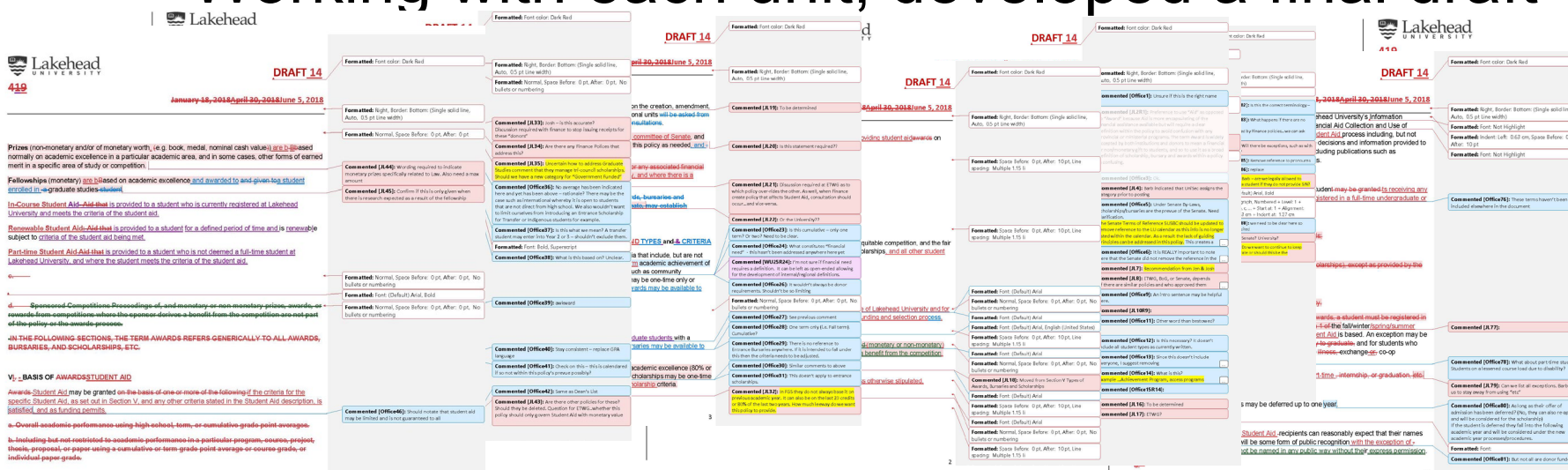
- Sought consultation:
 - Vice-Provost (Students) & Registrar and Vice-President External Relations
 - Athletics, Graduate Studies, Lakehead University International
 - Finance, Senate Committee for Scholarships
 - Legal



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    Research[Research] --> Writing[Writing]
    Writing --> Consultation[Consultation]
    Consultation --> Review[Review]
    Review --> Approval[Approval]
  
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The Policy



- Current status.
- Next steps:
 - Senate Approval
 - Education
 - Assess current procedures, update accordingly
- Formalized policy



Benefits

- Donor reporting is better (happier with results, awards are disbursed, and thank you letters).
- More money into the hands of students (reduction of unawarded).
- Improved communication between departments, decreasing frustration.

Benefits: Donor Reporting

- Increased satisfaction.
- Timely and timing of reporting.
- Increase in solicitation.





Benefits: Student Satisfaction

- Increased year-over-year applications.
- Decrease in unawarded awards.
- Increase of funding to students.
- Student recognition of recipients to donors.



Benefits: Departmental Communication

- Monthly meetings.
- Role clarity and understanding.
- Collaborative opportunities when needed.



Wrap Up

- Demonstration of best practice in procedures and communication between departments.
- Development of Student Financial Aid Policy.
- Demonstration of benefits to students and donors when siloes are broken down.