



UNIVERSITY OF GEORGIA

Development & Alumni Relations

SCHOLARSHIP PLAYBOOK

*A GUIDE TO SCHOLARSHIPS AT
THE UNIVERSITY OF GEORGIA*

2026–2027

contents



3 INTRODUCTION

4 GLOSSARY

13 SCHOLARSHIP AWARDING TIMELINE Sample Timeline

14 AWARDING Financial Administration & Budget | Application & Selection

22 FUND AGREEMENT GUIDELINES Overview and Resources | Procedure | Fund Agreement Criteria | Fund Maintenance Additional Resources

29 STEWARDSHIP Scholarship Gratitude Reports | Scholarship Luncheons | Student/Donor Meetings Thank You Notes | ThankView Videos | Student Consent | Consent Forms

45 KEY CONTACTS Office of Instruction | Office of Financial Aid | Donor Engagement & Stewardship | UGA Foundation

46 INDEX

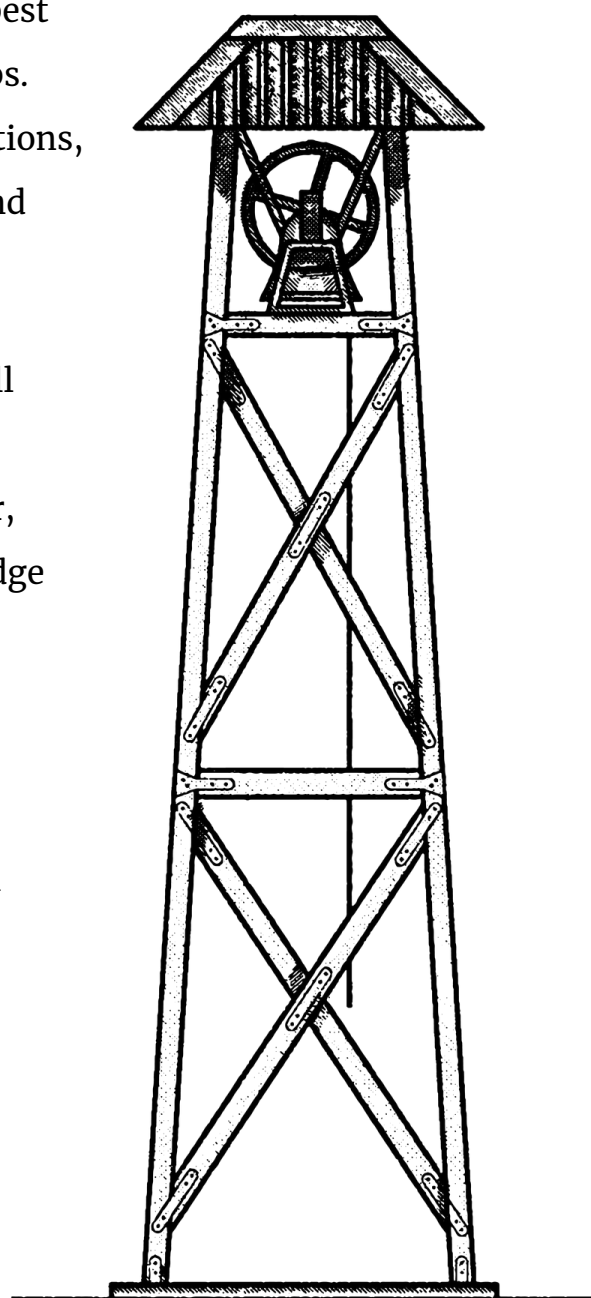
INTRODUCTION

BUILDING A FOUNDATION FOR BEST PRACTICES

The purpose of this playbook is to better equip you and your unit to facilitate scholarship administration, inform best practices and foster collaborative campus partnerships. Throughout the playbook, you will find helpful definitions, key resource guides, strategic timeline suggestions and privacy requirements.

This playbook is not exhaustive; you and your unit will likely need to tailor your scholarship awarding and stewardship processes to best fit your needs. However, this guide should help establish foundational knowledge for new employees, generate ideas for current employees, and support high-level scholarship administration and stewardship practices.

Stewardship changes lives. Unspent funds can mean a student goes unsupported. Lack of communication with donors about how their funds are used risks the loss of donor trust. We know why this work matters, and we hope this guide helps you facilitate it effectively. Thank you for all that you do to support the University of Georgia!



GLOSSARY

- **Assistantship** – A form of employment for a graduate student. The student is providing some service to the university, and compensation is provided monthly and processed through payroll. There is a work requirement.
- **Athena** – The UGA integrated student information system which enables secure web-based access to student information, including the student's financial aid application status and award. Access is available for anyone with a need to know.
- **Award** – Scholarships, fellowships and awards are similar terms and can sometimes be used interchangeably. In general, "award" refers to a one-time, non-renewable financial support given to a student based on achievement, academic performance or other criteria. The University of Georgia policy, in compliance with federal student aid regulations, requires that all scholarships, grants, awards, stipends, waivers and prize payments to students be made through the Office of Student Financial Aid. The only exception to this is if the fund is awarded as wages for employment.
- **Award Year** – The UGA Award Year begins each fall semester and is comprised of that fall semester, the following spring semester and summer sessions.
- **Consent: Donor Stewardship Consent** – Per the Family Educational Rights and Privacy Act (FERPA) and the Higher Education Act (HEA), written consent is required to release personally identifiable student information to a donor or non-scholarship administering university employee. Written consent is required for both need-based and merit-based scholarship recipients.

- **Consent: OSFA Scholarship Consent to Release Form** – In order for the Office of Student Financial Aid (OSFA) to release a student's financial award status or financial need, the student must complete the OSFA Scholarship Consent to Release Form. Disclosure of financial assistance for educational costs at the institution can only be released to a scholarship-granting organization or tribal organization with the student's explicit written consent.
- **Cost of Attendance (COA)** – Cost of Attendance (COA) parameters and components are determined by the Higher Education Act, Sec. 472. The COA is the cornerstone of establishing a student's financial need, as it sets the limits on the total aid that a student may receive from Federal Student Aid (FSA) and all other need-based programs. The student's COA is reflected on his or her UGA Financial Aid Award in Athena.
- **Direct PLUS Loan** – Direct PLUS Loans are federal loans that graduate or professional students and parents of dependent undergraduate students use to help pay for education expenses.
- **Direct Subsidized Loan** – A direct subsidized loan is a federal student loan for which a borrower does not need to pay the interest while in school, or in a grace or deferment period. These loans are based on the borrower's financial need.
- **Direct Unsubsidized Loan** – A direct unsubsidized loan is a federal student loan which offers students a low fixed interest rate, flexible repayment terms and is not based on financial need. The borrower is responsible for paying all accumulated interest until the loan balance is paid off.

- **Endowed Fund** – Perpetual funds that are invested in long-term investment portfolios. Original gift value, or the principal amount, is kept intact while a portion of the investment income is used to provide spending.
- **Endowment Minimum** – The minimum amount of money required to establish an endowed fund. The minimum is set to ensure the fund can generate sufficient income to support its intended purpose. Endowments must meet their minimum balance requirement before becoming eligible to receive a spending calculation.
- **Enrollment Status** – A student's enrollment status is based on the number of credit hours in which the student is enrolled at the end of each semester's drop/add period. Financial Aid cannot disburse for a student's period of non-enrollment.
- **Estimated Financial Need (EFN)** – Estimated Financial Need (EFN) is the difference between the student's Cost of Attendance (COA) and his or her Student Aid Index (SAI).
- **Experiential Learning** – Experiential learning experiences are required for all undergraduates to graduate and are approved centrally and by schools and colleges to fulfill requirements. There are six categories of experiential learning: creative, global, internship, leadership, research and service. Experiential learning scholarships exist in the Office of Instruction and in schools/colleges/units.
- **Federal Pell Grant Program** – The Pell Grant is the largest federal grant program offered to undergraduates and is designed to assist students from low-income households. To qualify for a Pell Grant, a student must demonstrate financial need by completing and submitting the FAFSA form.

- **Federal Student Aid (FSA)** – Refers to the student aid programs authorized under Title IV of the Higher Education Act (as amended) that provide financial assistance to eligible students enrolled in postsecondary education. The FSA programs currently available to qualifying UGA students are:
 - The Federal Pell Grant Program
 - The Federal Supplemental Opportunity Grant (FSEOG) Program
 - The Federal Work–Study (FWS) Program
 - The William D. Ford Federal Direct Loan (FDL) Program:
 - The Federal Direct Subsidized Stafford Loan
 - The Federal Direct Unsubsidized Stafford Loan
 - The Federal Direct Parent PLUS Loan
 - The Federal Direct Graduate / Professional PLUS Loan*

**This program has been terminated by legislation contained in OBBB. There are limited grandfathering provisions for students who were already enrolled at the time of the program's termination. These grandfathering provisions are expected to last no more than three years. Newly enrolling graduate students beginning programs Fall 2026 or later will no longer have the option to participate in this program.*

- **Fellowship** – Scholarships, fellowships and awards are very similar and can sometimes be used interchangeably. The term “fellowship” often refers to a graduate scholarship. In the case of the Graduate School’s fellowships, these are commonly stacked on top of a graduate student’s assistantship, increasing their payrate to accommodate the amount provided and are, therefore, processed through payroll. In this case, there is a work requirement.

- **Free Application for Federal Student Aid (FAFSA)** – To be considered for Federal Student Aid for a specific Award Year, students and parents of dependent students must complete the U.S. Department of Education’s FAFSA applicable to that Award Year. The FAFSA collects financial and other information used to calculate the Student Aid Index (SAI) and to determine much of a student’s basic eligibility through computer matches within the U.S. Department of Education and with other federal agencies. The FAFSA can also be used to apply for the HOPE and Zell Miller Scholarships, but it must be completed every Award Year. A student must have a completed FAFSA on file with OSFA in order for need-based scholarship eligibility to be determined.
- **Fund Agreement** – Describes the purpose of a gift and documents the mutual approval of the donor(s), the unit(s), the University of Georgia and the UGA Foundation. A fund agreement serves as a guide to ensure gifts are deposited correctly, spent appropriately and stewarded accordingly.
- **Grant** – Financial support based on academic achievement or other criteria that may or may not include financial need. A grant recipient is selected based on specific criteria, which is typically set by the federal or state governments of the institution. Generally, the proceeds of the grant are used to offset the cost of a student’s education for an upcoming or current academic year for performance or criteria met during the previous academic year. *Example: The Office of Student Financial Aid selects a recipient based on financial criteria and/or grade level, cumulative grade point average, and other criteria (i.e., Hope, Zell, Pell Grant). Credit for the grant is reflected on the student’s account for direct costs, including tuition, fees, room and board, or a reimbursement is made to the student via a check prepared and mailed to the student or direct deposit if the student’s other assistance has paid fees and room/board.*

- **Ineligible Non-Citizen** – Persons with non-immigrant visas (includes those with work visas, students, visitors and foreign government officials) are not eligible for Federal Student Aid (FSA), State of Georgia Financial Aid and other need-based aid administered by the UGA Office of Student Financial Aid (OSFA).
- **Loan** – Financial support which must be repaid, usually with interest.
- **Merit-Based Aid** – Financial aid awarded on the basis of specific accomplishments or talents rather than financial need.
- **Need-Based Aid** – Financial aid awarded on the basis of documented need. Need is determined through the Free Application for Federal Student Aid (FAFSA) process.
- **Non-Endowed Fund/In and Out** – Operates like a checking account, where the entire balance is available for expenditures. Funds are not invested and are held in cash.
- **Prizes and Drawings** – Recognition based on competition or other criteria. If a prize or drawing is open to only UGA students, the value of the prize must be reported to OSFA. If a prize or drawing is open to the public-at-large (students and non-students), it does not need to be reported to OSFA. *Example: A competition is held solely for students enrolled at UGA. Prizes for 1st, 2nd, and 3rd places are awarded. Per federal regulations, OSFA must include the prize value as part of a student's award package.*
- **Rural Scholar** – A student from a U.S. Census-designated rural place. Typically, in the state of Georgia, rurality is defined by counties with populations of less than 50,000.

- **Satisfactory Academic Progress (SAP)** – Satisfactory academic progress is the process a school uses to determine if a student is meeting all his or her educational requirements and is on target to graduate on time with a degree or certificate. This process may vary across schools.
- **Scholarship** – Scholarships, fellowships and awards are very similar and can sometimes be used interchangeably. The term “scholarship” often refers to undergraduate scholarships but is generally applicable.

Most typically, “scholarship” refers to financial support based on academic achievement or other criteria that may or may not include financial need. The donor of the scholarship, in consultation with the academic department and the UGA Foundation, sets the criteria for recipient selection. Proceeds of the scholarship are applied to the recipient’s student account, offsetting the cost of the student’s education for an upcoming or current academic year. The student must be enrolled during the semester the scholarship is issued to receive any benefit. There can be no work requirement.

Most scholarships are managed through the UGA Foundation, but you may also see “UGA Bursar Scholarships,” which are managed through the University’s Bursar’s Office. Endowments housed in the Foundation are actively managed and invested by the Foundation. Endowed funds housed at the University Bursar’s Office are also invested, just not in UGAF’s investment pool.

Example: Departments, schools or the Office of Student Financial Aid (OSFA) select recipients based on criteria of the scholarship agreement (e.g. major, grade level, grade point average, financial need, a combination of other restrictive criteria). Once the scholarship is processed, credit for the scholarship is reflected on the student’s account for direct costs, including tuition, fees, room and board. This directly offsets these costs or, if the student has other aid or has already paid these charges, a reimbursement/refund is made to the student via either a check prepared and mailed to the student or direct deposit.

- **Scholarship Universe** – Scholarship Universe is a state-of-the-art scholarship matching system that maximizes opportunities for UGA students and was developed to help students connect to as many relevant and legitimate scholarship opportunities as possible on one mobile friendly site. Scholarship Universe allows students to create an academic profile that enables them to be connected with various scholarship opportunities from external scholarship organizations. All scholarship funds distributed to students are required to be tracked through and facilitated through Scholarship Universe.
- **Selection Committee/Honorifics** – A group of institutional representatives who review applications and select awards based on scholarship criteria. Selection committees are not required.
- **Spending Allocation/Spending Side** – Rules and guidelines that determine how much of an endowment's return will be distributed for use in a given fiscal year. The goal is to balance the needs of the present with the needs of future generations, ensuring long-term financial stability. If an endowment meets the eligibility criteria and receives a spending allocation, those funds are available for use on the operational/spending side of the endowment. The corpus or principal amount remains intact, as only a portion of the investment income is used for the allocation.
- **Stewardship Recipient** – The constituent(s) who are set up to receive stewardship for the fund. The stewardship recipient can be the founding donor of the fund, a major donor to the fund, an executor/attorney, a foundation/board contact, fund honoree, family member and/or a development staff member. There can be multiple stewardship recipients per fund. The stewardship recipient information lives in GAIL on the fund's profile.

- **Stipend** – Payments from sponsored projects processed via Scholarship Universe or directly via the Bursar's Charge-to-Account process for both sponsored projects and other sources, in which case they are classified as "tuition" in UGA's financial system. To receive a stipend, the student is likely providing a service to the university, but the funds they receive are independent from the work they complete, as there may not be a work requirement to qualify for a stipend. If you are awarding funds from an external grant, it is typically best practice to work with sponsored projects.
- **Student Aid Index (SAI)** – An eligibility index that is used to determine how much federal student aid a student qualifies for.
- **Verification** – The U.S. Department of Education required process whereby the UGA Office of Student Financial Aid (OSFA) confirms that the information reported on a student's Free Application for Federal Student Aid (FAFSA) is accurate. A student's level of need cannot be determined while a student is in Verification.

SCHOLARSHIP AWARDING TIMELINE

FIRST YEAR STUDENTS

Every effort should be made to notify first-year students of scholarship awards before May 1, the UGA Commitment Deadline. This gives awards the greatest possible impact on a prospective student's decision to attend UGA. However, awards may continue throughout the summer if offers are declined or if a recipient meeting the donor criteria could not be identified before May 1.

RETURNING STUDENTS

Full Academic Year (Fall, Spring and Summer) Awards made at least two weeks prior to the [Payment Deadline](#).

SAMPLE TIMELINE

- **July:** Deadline to send scholarship offers to OSFA; deadline for funding
- **August:** OSFA applies funds to student accounts for the upcoming academic year/fall semester
- **October:** Review scholarship application; add any new scholarships
- **November:** Scholarship application for the following academic year opens; notifications sent to all students and reminders sent to current recipients to reapply
- **December/January:** Application reminders sent to students
- **February:** Application deadline; review criteria with Honorifics Committee Chair; Selection Committees begin meeting
- **March:** Development meets with the Business Office to confirm UGA Foundation spending allocations; Selection Committees finalize decisions by end of month
- **April:** Award scholarships for upcoming fall and next spring semester; notify recipients
- **May:** Follow-up reminders and/or new offers as needed

AWARDING

FINANCIAL ADMINISTRATION & BUDGET

Based on a fiscal year timeline:

EARLY MAY

- **Initial Update:** The UGA Foundation reaches out to the Office of Student Financial Aid and requests a current list of active funds in Scholarship Universe.
- **Foundation Allocation:** Based on the provided list, the Foundation provides spending allocations on the endowments for the upcoming fiscal year. This includes GCS endowments.
- **New Endowments:** During this period, the Foundation also adds any new scholarship endowments that are receiving their first spending allocation.
- **Open Academic Year in Scholarship Universe:** With collaboration of UGAF, OSFA opens the new academic year in Scholarship Universe for awards on endowment allocations.

JUNE 30

- **Close Academic Year in Scholarship Universe:** With collaboration of UGAF, OSFA closes down budgets for the current academic year in Scholarship Universe in preparation for the new academic year.
 - Awards for the prior year after this date will require a budget request form to be submitted to move budget from the new academic year to cover the prior year award.

EARLY JULY

- **Second Update:** UGAF provides an update to the initial budget load at the beginning of July.
- **Inclusions**
 - **Endowed, Non-Endowed and Unrestricted:** This update encompasses all fund types.
 - **Endowments:** For endowments, interim roll-forward cash balances as of July 1 are combined with spending allocations.
 - **Non-Endowed:** Interim roll-forward cash balances are budgeted.
 - **Unrestricted:** The approved, annual allocation is budgeted.
- **First Budget Update:** This serves as the first budget update for non-endowed and unrestricted funding.
- **Risk Consideration:** As these are interim cash balances, there is a risk of inflation due to ongoing activity from the prior fiscal year. This risk carries until the fiscal year is officially closed.

EARLY AUGUST

- **Third and Final Update:** At this point, a third and final budget update is processed.
- **Roll-Forward Cash Balances:** This update incorporates changes to the roll-forward cash balances that may have been influenced by additional expense activity during the prior year.
- **Final Budget Update:** Consider this as the concluding budget update to commence the new fiscal year.

UPDATING SCHOLARSHIP BUDGETS THROUGHOUT THE YEAR

1. Request Initiation

a. **Electronic Request:** A unit or department can initiate a budget update electronically via a TeamDynamix Ticket. This is done using the [Scholarship Budget Request Form](#).

b. Information Needed

- i. Fund name and number
- ii. Department name
- iii. Contact information
- iv. Business purpose
- v. Requested budget amount

2. Review Process

- a. Upon receiving the completed form, the UGA Foundation consults the Scholarship Code Report in Scholarship Universe.
- b. This review determines whether the fund and requested budget amount have already been provided to OSFA.

REVIEWING REQUEST

1. Fund and budget in Scholarship Universe:

Foundation Review: If it is determined that the fund and the requested budget amount have already been provided to OSFA, a response is sent back to the initiator of the TeamDynamix ticket.

Response: The response informs the initiator that the budget is available in Scholarship Universe. No further action is taken, and the ticket is closed.

REVIEWING REQUEST CONTINUED

2. No fund or budget in Scholarship Universe:

Foundation Review: The UGA Foundation staff evaluates criteria needed for establishing a budget. This includes spendable cash and a signed fund agreement.

- a. A signed agreement must be present before proceeding, as spending cannot occur without one.

No Signed Agreement: If there is not a signed agreement, a status update is requested by reaching out to the Fund Agreements team. A notification is sent to the initiator of the budget request ticket, informing them that a signed agreement is not available. The ticket remains open awaiting a response from the requestor.

Signed Agreement & Spendable Cash: If there is a signed agreement and spendable cash, the trust purpose of the fund is reviewed. The review ensures alignment with the business purpose provided in the ticket (e.g. awards, scholarships, emergency funding, etc.).

- a. **Trust and Business Alignment:** If trust and business purposes do not align, a message requesting additional information is sent back to the requestor.
- b. **Ticket Details Review:** the request is reviewed to confirm the fund number, fund name, department and unit were entered correctly.
 - i. The trust purpose from the fund agreement is added to the ticket. A determination of whether the fund is need-based is made and noted on the ticket.

OSFA Workflow & Approval: Once approved by the UGA Foundation, the ticket is then added to OSFA's workflow, and sent for their review. If no additional information is needed, OSFA will respond with approval.

REVIEWING REQUEST CONTINUED

3. Fund in Scholarship Universe, budget adjustment needed:

Foundation Review: First, confirm the total awarded amount stated in the Scholarship Code Report within Scholarship Universe has been posted to Workday. Additionally, the UGA Foundation verifies that there is spendable cash available.

- a. **Ticket Workflow:** If both conditions are met, the ticket is approved by the Foundation and forwarded to OSFA workflow for their approval.

APPLICATION & SELECTION

Application and selection processes will vary based on the school/college/unit. Two sample processes are provided below.

SAMPLE ONE

- Use one standardized application for all undergraduate scholarships and one application for all graduate scholarships (also known as fellowships).
- Use logic within the application to filter out applicants according to scholarship selection criteria. Applications cannot include questions related to age, color, disability, genetic information, national origin, race, religion or sex.
- Set an application deadline that will allow you to follow the awarding schedule of the Office of Student Financial Aid as closely as possible. Opening the application on November 1 and closing the application on February 28 will allow ample time for applications to be submitted and for selections to be made before students leave for the summer. In addition, it is early enough so that prospective students can take their financial aid package into account when making their college attendance decisions.
- Use one selection committee to choose all scholarships if possible. This ensures that all scholarships are on the same timeline throughout the year and the selection process is consistent throughout the unit.
- Schedule a meeting between your unit's Donor Relations contact and the Honorifics/Selection committee before the selection process begins to ensure that they are clear on what scholarships are being selected for and awarded and clarify any questions on donor intent or scholarship specifics.
- Your unit's Donor Relations office should partner with the Honorifics/Selection committee to ensure that donor intent is followed when making scholarship selections. If the scholarship is too specific, and a candidate that meets all criteria is not available, Donor Relations should work with the donor to ensure that a candidate is chosen that meets the criteria as closely as possible.

SAMPLE TWO

- Determine selection criteria for fund(s) from fund agreements and ensure questions are included on application to address each criterion. Applications cannot include questions related to age, color, disability, genetic information, national origin, race, religion or sex.
- Determine criteria for selection committees from fund agreements.
- Ensure timelines for application and selection align with Office of Student Financial Aid timelines and admissions deadlines in your school/college.
- Promote scholarship opportunities within your school/college/unit (student listservs, faculty meetings, Graduate School, social media, school/college website, etc.).
- After applications close, determine eligibility status of each student.
 - Financial need status can be determined by sending a list of student 810/811 numbers to osfa5@uga.edu via SendFiles. Specify if you want them to qualify the need (Yes – Most Need, Yes, Yes – Least Need, No Need, No FAFSA).
- Meet with appropriate committee to review eligible applicants.
- Make selections.
- Notify students who were selected.
 - Students should be asked to review terms of the scholarship.
- Enter scholarship award in Scholarship Universe.
- Notify students who were not selected.
 - Where possible, refer students to other funding sources.

BEST PRACTICES

- **Students should not be required to sign a form to accept a scholarship offer.** Scholarships should be awarded based on a student's qualifications. Rather than requiring a signed acceptance form, departments should send an award letter informing students of their scholarship and available opportunities as recipients.
- **Do not make donor engagement a condition of receiving a scholarship.** Students should not be required to meet with, thank, or otherwise engage with donors to retain their award. Donors should be informed that participation in stewardship activities is voluntary. Additionally, any required service or participation (whether as minor as a thank you note or as significant as participation on a panel) may make the scholarship taxable under IRS guidance. If such a requirement exists, students must be informed of the tax implications.
- **If a student does not participate in the program or activity for which the funding was awarded and disbursed, they must repay the funds to Student Accounts.** If a student does not participate in the program or activity for which scholarship funds were awarded, the department must cancel the award in Scholarship Universe, notify the student that repayment is required, and coordinate with Student Accounts, which will bill the student for the outstanding balance.
- **A scholarship may affect a student's financial aid eligibility.** Once a scholarship is awarded in Scholarship Universe and Banner, the Office of Student Financial Aid automatically reviews the student's financial aid package. If adjustments are needed, OSFA will contact the student. In most cases, scholarship funding replaces loan eligibility rather than increasing a student's total aid, helping reduce student loan borrowing.

FUND AGREEMENT GUIDELINES

Fund agreements are the linchpin of fund administration. A well-developed agreement is essential for stewardship, fundraising, and properly administering gifts to the UGA Foundation. Getting the agreement right on the front end reduces administrative burdens, sets clear donor expectations, and helps ensure the fund can serve its purpose in perpetuity. UGAF's website outlines the process for establishing a new fund agreement or making addendums, along with other helpful resources.

As a best practice, stewardship professionals, in consultation with their business office and development team, should monitor funds to ensure they are being spent appropriately and according to the fund agreement. Development officers should communicate with donors about the timeline and process for creating an agreement, including when they will receive a draft for review. This is also an important opportunity to discuss donor preferences and stewardship expectations with leadership. Generally, broader fund agreements are easier to administer both now and in the future.

Conversations with the donor about preferences and a thorough review of the draft agreement help maintain an efficient workflow. Any fund adjustments should be completed before submitting the agreement to UGAF for approval and DocuSign.

For ongoing fund administration, refer to the detailed fund agreement in the Fund Profile Report in Workday. Review funds in the fall semester, and if an endowment has not yet been awarded, consider an award for the spring semester. Conduct another review at the end of the fiscal year. If a historical agreement becomes difficult to award, work with a donor representative to develop an addendum. Ultimately, these funds are intended to serve the institution's needs and should be administered accordingly.

OVERVIEW AND RESOURCES

A fund agreement is created to document gift intent when the donor wishes to restrict the gift, and a current fund does not exist for this purpose. Gifts that cannot be deposited into an existing fund of the University of Georgia Foundation are generally used to establish a new fund if certain requirements are met. The fundraisers, or development officers, at the University of Georgia will determine this through their work with the donor(s) and/or donor representative(s) at the time the gift is made. The UGA Foundation accounting team acts as the facilitator in this process to answer questions and prepare the fund agreements for approval.

The development officers work with the donor(s) and/or donor representative(s) to prepare a fund at the time the gift(s) is made. The UGA Foundation acts as facilitator in this process to answer questions and prepare the fund agreements for approval.

Clauses for proposals, gift agreements or solicitations that discriminate in favor of or against age, color, disability, genetic information, national origin, race, religion or sex are prohibited as mandated by federal and state laws and regulations as well as UGA policy.

PROCEDURE

- The development officer should work with the donor(s) or donor representative(s) to develop a purpose statement and criteria. The amount and purpose of the gift will determine the type of agreement to use (see [Endowment Requirements](#)). The UGAF Gift Agreements team is available to assist with this determination.

- The development officer should fill out the [New Fund and Addendum Request](#) form to start the process for a new fund setup and draft agreement.
- The UGAF Gift Agreements team will prepare a draft and share it with the development officer through the TeamDynamix ticketing system. The development officer is responsible for sharing the draft with the donor(s)/donor representative(s) and relevant members of the benefiting unit.
- The development officer should respond to the TeamDynamix ticket with any questions, concerns or requested edits. The UGAF Gift Agreements team will review the feedback and provide a revised draft agreement. If no edits are needed and the agreement is ready for signature, the development officer should approve the ticket to move forward with signatures using the automated DocuSign signature process.
- The final fund agreement will then be loaded into DocuSign; which includes two stages: (1) official approval from all UGA internal signers and (2) signatures from the donor(s)/rep(s) and UGA internal signers. The DocuSign process begins with the development officer's official approval of the final draft, followed by review/approval from UGA internal parties. Once internal approvals are complete, the agreement returns to the development officer before being sent to the donor(s)/rep(s) for signature. At this point, the development officer should notify the donor(s)/rep(s) to expect the DocuSign email in case it is filtered into spam or junk folders.
- Once all signatures are obtained on the fund agreement, DocuSign will automatically email a PDF copy of the finalized agreement to all parties involved in the DocuSign process, including the donor(s)/rep(s). The finalized agreement will also be uploaded to the fund in the Financial Accounting System and will be viewable in the Fundraising System.

FUND AGREEMENT CRITERIA

ENDOWED FUNDS

- An endowed gift is one in which the original principal is never invaded, and the gift exists in perpetuity. Endowments are generally funded within five years (or less) of the initial contribution. Income is distributed annually pursuant to policies adopted by the University of Georgia Foundation.
- The type of endowment determines the type of fund agreement required. Please see [Endowment Requirements](#) for the various kinds of endowed funds and the minimum funding required to establish each one. There are generally four endowed fund agreement formats. They are:
 - Endowed – This agreement is used when the initial gift(s) is sufficient to meet the endowment requirement.
 - Time-Period Specification – This agreement is used when the gift(s) will be received over a period of time (up to five years). The time period is indicated in the fund agreement, and expenditures from it are prohibited until the minimum funding is reached.
 - Chairs/Professorships – Chairs and professorships are generally created as endowments. Language in the fund agreement satisfies University of Georgia and Board of Regent requirements for hiring professors to a named chair or professorship position.
 - Declaration of Trust – This agreement is used when a gift(s) is received through a deferred mechanism: The donor(s) is deceased, and the gift(s) has been received through a deferred gift or from an estate. A finalized planned gift agreement or will is usually the source for drafting this type of agreement (although a declaration of trust may also be a non-endowed agreement).

NON-ENDOWED FUNDS

- A non-endowed gift agreement ensures the gift(s) will be spent to support the fund purpose. There are two types of formats for non-endowed fund agreements:
 - Non-Endowed – A non-endowed fund generates no investment earnings and is not assessed a fee.
 - Declaration of Trust – This agreement is used when a gift(s) is received through a deferred mechanism. The donor(s) is deceased, and the gift(s) has been received through a deferred gift or from an estate. This fund follows the same criteria as the endowed declaration of trust, except that the donor's intent is for the entire gift to be expended for the intended purpose indicated by a deferred gift arrangement, a finalized planned gift agreement, a will or any other document which transfers the estate gift to the Foundation.

ADDENDUMS

- Addendums are used to make minor modifications to original fund agreements. Changes to original fund agreements are not encouraged and should be decided on a case-by-case basis.
- In some cases, to be determined by the UGAF Gift Agreements team, a full replacement agreement may be more appropriate than an addendum.
- Addendums may be requested using the [New Fund and Addendum Request](#) form.
- Changes to the benefiting department name through department mergers or university renaming will be handled by the UGA Foundation office and do not require an addendum, except in certain rare instances.

FUND MAINTENANCE

- The UGA Foundation periodically reviews unsigned, expired, and inactive funds and may contact the benefiting unit to discuss possible options for next steps. This ensures donations are utilized to support UGA's mission. The terms of each fund agreement are followed in all cases, and highest priority is placed on honoring the intent of the donor(s)/rep(s).
- Unsigned fund agreements are reported quarterly to ensure progress through the approval stages. The UGAF Gift Agreements team will contact the appropriate development officer to determine the status and the necessary steps to finalize the agreement.
- Endowments not fully funded during the time period described in the agreement are reported annually. The UGAF Gift Agreements team will contact the appropriate development officer for information. The development officer will work with the head of the unit to choose an appropriate path forward. The unit may choose to (1) provide a plan to raise additional gifts, (2) transfer the balance needed from one of the unit's general funds, or (3) close the fund and transfer the balance to the unit's general fund. If a fund closure is requested, the fund agreement will be used to guide the process.
- Funds with no activity for twelve consecutive months are reported annually. The UGAF Gift Agreements team will contact the appropriate development officer for information. The development officer will work with the head of the unit to choose an appropriate path forward. The unit may request (1) the fund remain open for future needs or (2) the fund be closed, and the balance transferred to the unit's general fund. If a fund closure is requested, the fund agreement will be used to guide the process.

ADDITIONAL RESOURCES

[UGA Foundation Resources](#)

[Endowment Minimums for Faculty/Staff Enhancement](#)

[Endowment Minimums for Student Support](#)

[New Fund Request](#)

BEST PRACTICES

Please see some suggested scholarship selection criteria terms and definitions below:

- **Low Income** – Typically indicated by FAFSA information and student has demonstrated limited capacity available in family financial support.
- **First-Generation Student** – Being a first-generation student means that your parent(s) did not complete a 4-year college or university degree, regardless of other family members' level of education.

STEWARDSHIP

SCHOLARSHIP GRATITUDE REPORTS

Scholarship Gratitude Reports are mailed to scholarship donors twice a year: once in the fall and once in the spring.

FALL GRATITUDE REPORTS

All scholarship recipients from participating schools and colleges are contacted at the beginning of the fall semester and asked to complete a survey that collects their name, hometown, and educational information. They are also invited to write a message of gratitude to their donor and provide an update on their experience as a student at UGA. The student's message of thanks is then nicely packaged and mailed to the scholarship's stewardship recipient(s) at the end of the fall semester.

SPRING GRATITUDE REPORTS

New scholarship recipients, as well as recipients who did not respond to the Fall Gratitude Report request, are contacted at the beginning of the spring semester and asked to complete the same survey. The student's message of thanks is then nicely packaged and mailed to the scholarship's stewardship recipient(s) at the end of the spring semester.

SCHOLARSHIP GRATITUDE REPORTS CONTINUED

- These gratitude reports are very meaningful to scholarship donors and give them a glimpse into the incredible impact they are making at UGA.
- Of the two reporting periods, the fall mailing has the larger recipient list. The spring mailing typically captures new recipients and those who did not respond in the fall.
- Students are highly encouraged to participate but cannot be required to do so.
- The Office of Donor Engagement and Stewardship makes an effort to make student participation straightforward and rewarding for the student.



Sample Scholarship Gratitude Report from 2025–2026

SCHOLARSHIP LUNCHEONS

- Scholarship luncheons/events are where scholarship donors and their recipients come together to meet and make connections.
- Scholarship events like these typically occur once per year.
 - A sample list of schools and colleges currently facilitating scholarship events:
 - College of Engineering
 - Morehead Honors College
 - School of Social Work
 - School of Law
 - Hugh Hodgson School of Music
 - Student Affairs
 - Warnell School of Forestry and Natural Resources
- An example of the planning process at the College of Engineering is outlined below:
 - The College of Engineering holds its scholarship luncheon in the fall (typically late October or early November).
 - Engineering sends two waves of save-the-dates. Their initial save-the-date is sent in July as part of their scholarship introductory cards that are mailed to donors. Student consent must be obtained before sharing any student information with donors. Once consent has been received, these cards provide basic information about the donor's scholarship recipients, including their name, hometown, expected graduation year, and major. An official save-the-date email is sent to all groups in August. The invitation list includes all scholarship recipients, donors, the Office of Student Success and Achievement, development team members, the Dean, assistant deans, and school chairs.
 - Formal invitations and an RSVP link are emailed to all invitees approximately 6-8 weeks before the event. Digital invitations are prioritized over printed materials to avoid mail delays, simplify the RSVP process, and eliminate printing and postage costs.

- Students are informed about the event at the beginning of the semester through an introductory email from a donor relations staff member outlining the stewardship activities they will be invited to participate in throughout the year. Students are also invited to visit the office to write a thank you note, during which time staff members get to know the students and, when possible, share information about their donor.
- RSVP follow up:
 - As the RSVP deadline approaches, students and donors who have not yet registered are contacted. If a donor has registered but their scholarship recipient has not yet confirmed their attendance, the student is contacted and encouraged to attend. If the student is unable to attend, the donor relations staff notifies the donor in advance.
 - If a student has not responded after two outreach attempts, we recommend treating the lack of response as an indication that they do not wish to participate at this time. At that point, no additional follow-up should be made.
- Once the RSVP list is finalized, seating charts are created. If a donor or student does not have their corresponding recipient or donor in attendance, they are thoughtfully seated with others to encourage meaningful interactions and ensure a positive experience. In cases where donors and students are unable to meet at the luncheon, a virtual meeting can be coordinated or arrangements can be made for them to meet on campus at a later date.

- Logistics for the luncheon:
 - Catered buffet
 - Tables of 8
 - Pre-reception begins at 11:30 a.m. (gives attendees a chance to get their nametag, pair up with their student/donor, take pictures, meet and greet, etc.)
 - A professional photographer is on hand to take group pictures of students with their donors. These pictures are printed on site and placed in branded College of Engineering photo folders for attendees to take with them after the luncheon. *Note: If you plan to use these photos for non-personal use, please be sure to include a photo release at the event.*
 - Luncheon begins at 12 p.m.
 - An Engineering staff member is placed at every table to help facilitate discussions if needed and serves as a flexible seat in case there are walk-ins.
 - Development officers are seated with the donors they are most familiar with.
 - The program includes both a student speaker and a donor speaker. The Dean will also provide closing remarks. During these remarks, both donors and students are recognized, as the event serves as both a donor stewardship opportunity and a celebration of scholarship recipients' achievements.
 - Future programs may take the form of panel discussions to make the experience more interactive. Participants may include the Dean, two donors and two scholarship recipients to provide a variety of perspectives.
 - The luncheon ends promptly at 1 p.m.

If you have questions about this event, please contact Kim Brown in the College of Engineering at kimberly.brown2@uga.edu

STUDENT/DONOR MEETINGS

- Student/donor meetings are a great opportunity for students to thank their donors and share how their scholarships have helped them succeed at UGA. These interactions are meaningful for both the student and the scholarship donor.
- Meetings can be held either in-person or virtually.
- If a donor supports multiple scholarship recipients, they may choose to meet with students individually or in a group setting, depending on their preference and availability.
- The student must sign a consent form prior to meeting with the donor.
- The day before the meeting, send the student a reminder email that includes important details such as:
 - Location, date, time and parking information
 - Confirmation that the cost of their meal will be covered if they are asked to attend a lunch, dinner, or coffee meeting
 - Dress code expectations
 - The phone number of the staff member leading the meeting (in case of last-minute changes or questions)
 - A list of individuals who will be present at the meeting
 - An overview of what to expect during the meeting
- Please ensure that a UGA Development staff member is present to help guide the conversation and ensure students are not asked anything inappropriate or uncomfortable.
- Light snacks and water bottles are a nice touch to include during these meetings.
- If the donor will be meeting with students in a group setting, provide name tags or name cards. Providing the donor with a briefing in advance is also helpful. This briefing should include the meeting location, date, time, parking information, the names of the scholarship recipients who will be in attendance along with their education information, hometown, and expected graduation.

TIPS FOR COLLECTING THANK YOU NOTES

- Contact your scholarship recipients at the start of the semester. Use this opportunity to introduce yourself and explain the various stewardship activities students will be asked to participate in throughout the year (thank you notes, donor events or meetings, videos, etc.) and why these activities are important. Outline the stewardship timeline so students know when they can expect to be contacted.
- For students with multiple scholarships, encourage them to write a thank you note for each scholarship they receive. Explain the importance of these notes, such as showing gratitude, demonstrating impact, and laying the groundwork for future gifts to support scholarships.
- Provide a clear timeframe and a specific deadline. Send up to two reminders to encourage students to complete their thank you notes.
- Provide a space or workstation in your office that gives students all the tools they need to write their note and make the process as easy as possible. If students are unable to come to the office, implement an easy and accessible alternative.

ITEMS TO PROVIDE FOR THANK YOU NOTES

- Clear instructions for writing the notes
- Blank, branded note cards
- Pens
- Suggested wording or examples
- Donor salutation for each scholarship
- The name of each scholarship the student is receiving (many times they don't remember)
- A place to collect completed notes
- Consent form granting permission to share information through thank you notes

Another option is to organize a thank you note event where students can come during a specific timeframe to write their notes in a central location. Offer free food or other incentives to encourage attendance.

THANKVIEW VIDEOS

- ThankView videos are a great way to steward scholarship donors. Donors appreciate hearing directly from their students, and receiving a personalized touchpoint where they can see and hear from their scholarship recipient is especially meaningful.
- ThankView videos can be used any time of year, whether for an initial introduction or as follow up to a meeting or event.
- Suggested topics for students to cover in their videos:
 - If post-event: Thanking the donor and mentioning how nice it was to see them.
 - Sharing information about the classes they are taking, including their favorite or most challenging courses.
 - If sending in the spring, an update on how the academic year is going.
 - For graduating seniors: Announcing their graduation and thanking the donor for the collective impact the scholarship has had on their educational journey. These messages are especially meaningful to donors.
- To help students be successful, provide a suggested script along with tips and guidelines for creating a quality video, including dress code expectations. Encourage students to record their videos in recognizable campus locations and advise against filming in apartments/dorms or in front of messy or distracting backgrounds.
- Offer assistance to students as needed. Allow 2–3 weeks for completion and plan to send two reminders.

BACKGROUND

The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records and gives students important rights over how that information is handled. At its core, FERPA ensures that a student's education records – such as grades, financial aid records, and course schedules—are not shared freely or indiscriminately. FERPA is built on the principle that students have meaningful control over who can access their educational records and for what purpose.

A key component of FERPA is the requirement that a school must generally obtain valid, written consent from a student before disclosing that student's educational records to a third party (including donors). This consent requirement is foundational to FERPA's privacy protections, as it ensures transparency and preserves a student's ability to control the use and distribution of their personal education records.

Below is a step-by-step decision tree to help you determine when student consent is required, what constitutes FERPA-compliant consent, and what types of information may or may not be disclosed, particularly in connection with scholarships and financial aid.

STEP 1

Are you sharing any information about an identifiable student?

Examples:

- Student's name, photo, quote, major, hometown
- Student's receipt of a scholarship or participation in a donor-funded program
- Student's thank-you note, gratitude report, profile, marketing story

➤ **If NO** → No FERPA issue. You may proceed.

➤ **If YES** → Go to Step 2.

STEP 2

Will the information be shared with someone outside the University?

Examples of “outside the University”:

- Individual donors
- Donor families
- Corporate or foundation donors
- Foundation trustees or advisory board members

➤ **If NO** (internal only) → May only disclose to school officials within UGA that have a legitimate educational interest in the information (e.g., the individual needs the information to do his/her job).

➤ **If YES** → Go to Step 3.

STEP 3

Is the student still enrolled or was the information obtained or created while the student was enrolled?

FERPA applies to current students and to records created while the student was enrolled.

➤ **If NO** (e.g., pure alumni record created after enrollment ended) → FERPA generally does not apply. Confirm with UGAF/DAR Legal if uncertain.

➤ **If YES** → Go to Step 4.

STEP 4

Does the disclosure involve financial aid or scholarship information?

Examples:

- Receipt of a named scholarship
- Participation in a donor-funded aid program
- Any implication of financial need or aid eligibility

➤ If NO → FERPA consent still required. Go to Step 5.

➤ If YES → Go to Step 4A.

STEP 4A

Is any data in the disclosure considered FAFSA data or Federal Tax Information (FTI)?

Examples of FAFSA data (do NOT disclose):

- SAI (Student Aid Index)
- Dependency status
- Marital status
- Pell Grant eligibility status
- Demographic information
- Manually entered financial information

Examples of FTI (do NOT disclose):

- Tax filing status
- Adjusted gross income
- Number of exemptions and dependents
- Income earned from work
- Parental total income

Examples of information that is not considered FAFSA data or FTI:

- Total aid awarded
- Grant aid and amount by source
- Unmet financial need

➤ If YES → Do not disclose FAFSA data or FTI under any circumstances.

➤ If Unsure → Consult UGAF/DAR Legal.

➤ If NO → Proceed to Step 5.

STEP 5

Do you have a FERPA-compliant consent for this specific use?

A valid consent must:

- Be in writing
- Be dated
- Specify the information that may be disclosed
- State the purpose of the disclosure (e.g., donor thank-you, event attendance, publication)
- Identify the recipient or class of recipients (e.g., “XYZ Scholarship donors”)
- Be signed by the student
- Expressly provide that the student has the right to revoke the consent

► If NO → Do not share information. Obtain consent first.

► If YES → Please review the checklist below and proceed.

- ✓ Share **only** what the consent allows
- ✓ Do **not** add extra biographical or academic details not specified in the consent
- ✓ Do **not** discuss *why* a student qualified for aid
- ✓ Ensure the disclosure is logged or traceable

A NOTE ON DIRECTORY INFORMATION

Directory information is information contained in the education records of a student that would not generally be considered harmful or an invasion of privacy if disclosed.

The University System of Georgia defines the following as Directory Information:

- Student's name
- Hometown
- Institution assigned email address, but may only be disclosed without consent to other, current students. Further, students may not request email listings of the entire student body or segments thereof, except for academic purposes.
- Major field of study
- Enrollment status (e.g., full-time, part-time)
- Participation in officially recognized activities and sports
- Dates of attendance
- Degrees, honors, and awards received
- Thesis/Dissertation title
- The most recent educational institution attended
- Height and weight of athletes
- Class level

 **Important:** The moment directory information is linked to scholarship receipt, donor support, aid status, or impact, it is no longer directory information.

CONSENT FORMS

- Students are not required to complete stewardship activities as a condition of receiving their scholarship. This applies to both need-based and merit-based scholarship recipients.
- Written consent is required when asking a student to participate in stewardship activities that involve sharing their information with donors. Examples include writing thank you notes, attending events or donor meetings, participating in videos, or similar activities.
- The consent form should include the following:
 - Be in writing (verbal consent is not sufficient)
 - Be dated
 - Be signed by the student or be SSO-protected
 - Specify the records that may be disclosed
 - State the purpose of the disclosure
 - Identify the party or class of parties to whom disclosure will be made
- Template consent forms are available for your use in Microsoft Forms on the [DAR Resources page](#). Templates are available for the following purposes:
 - Events
 - Scholarship meetings
 - Photos/videos
 - General consent
 - ThankView videos
 - Thank you notes

Please reach out to Caitlin Lacey (cslacey@uga.edu) or Haley Arner (haley.arnner@uga.edu) for more information.

STEWARDSHIP BEST PRACTICES

- If possible, connect with your scholarship students at the beginning of the semester, either via email or preferably in person. This helps build trust, establish rapport, and ensures they have a contact they feel comfortable reaching out to.
- When inviting students to events, use both in-person and electronic forms of communication to help ensure they receive the information.
- To ensure proper addressing and mailing, have students submit their completed thank you notes to Donor Engagement and Stewardship staff, who can then address and mail them.
- Provide students with suggested wording, while also encouraging them to personalize their notes by including a message of thanks, personal updates, and reflections on the overall impact of their UGA experience.
- The greatest success in student thank you note writing occurs when students understand the importance of the process and the meaningful impact their messages have on donors.

KEY CONTACTS

Office of Instruction

**For general scholarship questions and For Georgia. For Generations. Scholarship Campaign Questions*

- Graff Wilson: james.wilson2@uga.edu

Office of Student Financial Aid

**For assessing student need eligibility and any awarding questions*

- Lori Whitaker: loriwhit@uga.edu
- Shelby Jarrett: sjarrett@uga.edu

Donor Engagement and Stewardship

**For scholarship gratitude reports and scholarship stewardship questions*

- Caitlin Lacey: slacey@uga.edu
- Haley Arner: haley.arnier@uga.edu

UGA Foundation

**For fund balance/spendable, fund agreement, and legal questions*

- Will Hearn: whearn@uga.edu
- Jennifer Hancock: jgary@uga.edu
- Haley Robison: hrobison@uga.edu

INDEX

[Endowment Minimums for Faculty/Staff Enhancement](#)

[Endowment Minimums for Student Support](#)

[Endowment Requirements](#)

[Foundation Service Requests](#)

[New Fund and Addendum Request](#)

[Payment Deadlines for the 2026-2027 Academic Year](#)

[Scholarship Budget Request Form](#)

[Scholarship Universe](#)

[Scholarship Universe User Guide and Resources](#)

[UGA Foundation Resources](#)

