

Clemson University
Development & Alumni Relations

Overview of Scholarship Giving

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Document Purpose

This document is intended for internal use only by members of the Development and Alumni Relations (DAR) Division. It should never be shared with donors!

It provides a comprehensive overview of our scholarship program with specific focus and emphasis on recruiting scholarships. It is not a marketing document, but more of a reference tool. There are quick reference appendices at the end, which can be utilized as a stand-alone resource.

The document was drafted by a collaborative group with representatives from all DAR functional areas. A full review of the document will be conducted every 5 years and updates will be made periodically as needed and shared electronically with the Division. If you have suggestions for revisions to the document, please submit those by clicking [here](#).



Executive Leader Statement

Today, Clemson University's philanthropic scholarship arsenal is not nearly the size it needs to be in order to recruit the best incoming freshman class each year, support them as returning students, and retain them until graduation. It will take all of us to change this.

This initiative is critically important for Clemson University and something that our university leaders, President Clements, and Provost Jones, are depending on us to deliver. These efforts will allow us to achieve two key goals: 1) grow the scholarship funds within our CUF Endowment to levels that rival our peers and 2) provide immediate impact to students who might not be able to attend or remain at Clemson without these vital scholarship resources.

Why We Need to Increase Our General Scholarship Funds

Clemson's excellence is evident, but trends in higher education and at Clemson warrant a laser-focus on raising philanthropic scholarship dollars:

- Income disparities remain a major challenge for students
- National competition for top scholars is increasing
- Clemson's commitment to its land grant mission to educate South Carolina's students and increase prosperity within the state
- There is no additional room to increase discounting for tuition

We must grow the University's capacity to support its students! Increased capacity in our scholarship resources will allow:

- Targeted recruitment of high performing students from economically challenged families and communities
- Strategic focus on academic merit to keep us competitive in an increasingly tight market for high performing undergraduates in-state and nationally

Our national prominence is attracting record numbers of undergraduate applications, but if we can't compete with our applicants' other financial offers or meet their financial needs, we will never have the chance to offer them the unrivaled Clemson experience – one we know will change them **forever**.

We want Clemson University to be home to the **best and brightest** students, a place that encourages and supports them as they **pursue their dreams**.



Clemson's Scholarship Reality

Each year Clemson University works to bring together the next class of Tigers, and so much of the elements of that class are dependent on the financial aid and scholarship packages that are available for those students.

- Our national prominence is on the rise and is driving increased admissions applications. Last year Clemson received almost 29,000 applications for just 3,800 freshman seats.
- At Clemson we are committed to our land grant mission, and a big component of that mission is ensuring that spots are available for the students of South Carolina. Clemson University, our Board of Trustees, and the University Leadership work to ensure that a minimum of 60% of our freshman seats are held for South Carolina students. But holding spots is not enough...
- In relation to South Carolina's higher education attainment rate, we slightly improved to a 39th ranking nationally; meaning that 38.5% of our young adults (ages 25-34) have an associate degree or higher (US Census Bureau, American Community Survey of 2017). Clemson is committed to help lift our state up, and education is one of the most important ways we can make a difference. But even with our continued efforts to make a Clemson education affordable, paying for college can be a huge barrier for prospective students.
- South Carolina currently ranks 42nd with a 15.4% poverty rate, which is the percentage of people who had incomes below the poverty line or \$24,860 for a family of four (US Census Bureau, American Community Survey of 2017).
- While the average level of financial need that Clemson students have remained relatively constant, the number of enrolling students with financial need is steadily increasing.
 - In the 2016/2017 class, 6,692 students from South Carolina enrolled with financial need. This number increased to 7,294 with the 2019/2020 class, which has an average need level of \$21,594.
 - 46% of our latest graduating class left Clemson with student loan debt averaging \$21,615.
 - While the above average doesn't appear staggering for a 4-year degree, the number includes only federal student loans assumed by the student and doesn't factor in any private loans or parental loans that might be taken.
- Ensuring that the best and brightest students remain in South Carolina is a driver of increased economic activity for the state! In fact, statistics show that 42% of alumni from four-year institutions remain residents in the state where they attend college. Over the course of their



lifetime, the average bachelor's degree holder contributes \$278,000 more to local economies, which is three times the level of a high-school graduate (Brookings.com).

- The best and brightest South Carolina students are those who are considered Palmetto Fellows.
- Below is the list of top 5 schools in the Southeast where Palmetto Fellows enroll instead of Clemson:
 - Duke University
 - Vanderbilt University
 - Georgia Institute of Technology
 - University of Georgia
 - Emory University
- Additionally, some of the top students in South Carolina are choosing to attend other South Carolina schools because those institutions are providing better scholarship packages that alleviate the need for student loan debt when they enter the workforce or pursue advanced degrees.
 - In 2014 this number was 1,503; in 2019 it's 1,687. This represents almost 40% of our total incoming freshman class.
 - Below is the list of top 5 schools in South Carolina where students who are admitted to Clemson ultimately enroll:
 - University of South Carolina
 - College of Charleston
 - Wofford College
 - Anderson University
 - Furman University
- When we think about our out-of-state students, whether they are Clemson legacies or new students starting a family legacy at Clemson, we must be just as diligent to ensure that finances or competitive packages from other institutions are not a driving factor for their decision not to attend Clemson.



Current Philanthropic Impact

Let's explore some data points about the private philanthropic support and endowment funding that helps provide scholarship funding for Clemson University.

- As of July 2019, Clemson University's endowment assets are approximately \$775M. While 34% of our endowment is designated for all types of student aid, **only 15-20% of those funds can be used for recruiting scholarships.**
- Additionally, Clemson has a very small "General Scholarship Fund". Today our Clemson Scholarship Fund has a balance of \$2.1M and pays out \$71K annually. We can do better!
- The FY19 Endowment payout for recruiting scholarships was approximately \$4M. Additionally, the University is providing institutional aid to make education more affordable for students. The total amount of funding that CU invests in scholarship packages is \$45M.
- Clemson has a bold vision of raising scholarship dollars in a strategic way that can be used for recruiting and retaining the best and brightest Clemson students. For example, if we were able to add \$250M to our scholarship endowment, specifically for recruiting scholarships, by 2035 the philanthropic support available for recruiting scholarships will be close to **\$10M annually.**
- Focusing on building the endowment for tomorrow as well as providing funds to compete today is the key. This is the reason that scholarships will be one of our top priorities for Clemson University's next capital campaign.



The Revising of Scholarship Restrictions

As we work with donors to raise funds to support our students with additional scholarship resources today, we need to ensure that scholarship endowments are also going to support the students that Clemson will be recruiting in the future.

Scholarships are powerful and they directly affect the caliber of our student body, the quality of the academic experience, the prestige of the University, and the livelihood of new graduates. The gifts that we inspire in our daily work will have a transformational effect on the future of Clemson University. Needs of the University and restrictions that are relevant today are not necessarily going to remain in years to come.

The student demographic has shifted:

- Let's use an example of a real endowment that was created in the 1950's by a generous family from Oconee County, South Carolina. Their endowment was intended to "provide a four-year agricultural scholarship to a worthy, capable, and deserving rural farm boy from Oconee County whose parents' or guardians' chief source of income is from the farm. If no suitable candidate is available from Oconee County, then a Pickens County resident may be awarded the scholarship."
- Fast-forward almost 70 years, there are much fewer farming families from Oconee or Pickens County, South Carolina sending a student to Clemson. Additionally, if the student did come from a farming family, they wouldn't be eligible for the scholarship unless they majored in Agriculture.
- This very restrictive scholarship is extremely difficult to award because there are so few students who fit the defined restrictions within the fund agreement.

The dynamic career aspirations of a college freshman:

- How many 18-year-old students know exactly what they want to do when they grow up? And they are expected to choose a major or field of study during the college application process, which makes them even younger than 18. Statistics show that 80% of college students will change their major at least once!
- Scholarship packages are then awarded based on declared major at the time of application, and Clemson commits to provide that scholarship funding for 4 years/8 semesters, provided the student maintains the minimum academic requirements. A change in major causes a potential stewardship issue because they are receiving a scholarship that was restricted to their previous major.
- This is one of the more compelling reasons we want to ensure flexibility in funding, so if a talented student decides that mechanical engineering is not the right major for them, the University nor the student is put in a detrimental situation.



- Lastly, some of our major and department restricted scholarships are not able to be maximized for recruiting because of the trend to declare a Pre-major within a specific college.
 - For example, within the College of Business and the College of Engineering, Computing and Applied Sciences, students are classified as Pre-Business or General Engineering while they complete the foundational courses to allow a more informed decision about major declaration. This means that many scholarships restricted to a specific academic department are not able to be used for strategic recruitment.

Changes in policy or state funding available:

- Over 98 percent of all in-state Clemson freshmen receive either the Palmetto Fellows or LIFE scholarship, but this funding is not guaranteed.
- As policy shifts and/or state leadership transitions, future funding for CU and for our students could change as a result.
- It is vital for us to create safeguards by raising philanthropic funds today that will sustain our University for years to come.

Implications due to overly restrictive scholarship endowments:

- These few examples shared above are why we have determined it is necessary to minimize the restrictions for scholarships. We want to ensure that the most flexible funds are available for the University to meet its goals and priorities each year.
- A second critical outcome to these changes is to ensure that scholarship endowments do not have unused spending balances due to restrictions in the fund purpose creating potential donor stewardship issues.
- The total number of Endowed and Annual Scholarships is 1341. Of those, only 54 (4%) are university-wide, unrestricted funds.



Giving Scenarios

The donor under \$25K:

- **Paths to Giving**
 - Give to the Clemson Scholarship Fund
 - Give to a College's Scholarship Fund
 - Give to one of the already created Established Programs' Scholarship/Grant-in-Aid funds
 - Create an annual scholarship following the minimums and designation/restriction guidelines with a 4-year commitment

The donor can give between \$25K and \$49K:

- **Paths to Giving**
 - Give to the Clemson Scholarship Fund
 - Give to a College's Scholarship Fund
 - Give to one of the already created Established Programs' Scholarship/Grant-in-Aid funds
 - Create a Named Endowment with University-wide impact plus the companion annual scholarship. The named scholarship endowment and companion annual scholarship are separate gifts with associated minimums and designation/restriction guidelines.

My donor cannot meet the minimums for a college-level endowed scholarship (\$50K) but is passionate about the College of Science:

- **Paths to Giving**
 - Can we inspire them to give to the College of Science Scholarship Endowment?
 - Do we encourage them to start a University-wide named endowment and companion annual while continuing to grow their endowment over time until it reaches the College minimum and can be re-directed?
 - Determine if the donor is most passionate about scholarships or their College? If scholarships, follow one of the paths outlined on this page. If it is their College, pivot the conversation to operating or programmatic support for the college versus scholarships.

The donor can give between \$50K and \$99K:

- **Paths to Giving**
 - Give to the Clemson Scholarship Fund
 - Give to a College's Scholarship Fund
 - Give to one of the already created Established Programs' Scholarship/Grant-in-Aid funds
 - Create a Named Endowment with university-wide impact or select one of the Primary Designations/Restrictions. Remember to close the companion annual scholarship so the donor can experience stewardship and impact right away! The named scholarship



endowment and companion annual scholarship are separate gifts with associated minimums and designation/restriction guidelines.

The donor can give between \$100K and \$749K:

- **Paths to Giving**
 - Give to the Clemson Scholarship Fund
 - Give to a College's Scholarship Fund
 - Give to one of the already created Established Programs' Scholarship/Grant-in-Aid funds
 - Create a Named Endowment and companion annual scholarship that includes a Primary designation/restriction and up to five (5) Secondary designations/restrictions based on the corresponding giving level. The named scholarship endowment and companion annual scholarship are separate gifts with associated minimums and designation/restriction guidelines.

The donor can give \$750K+ :

- **Paths to Giving**
 - Create a Customized scholarship that can be tailored to the donor's primary passion areas. Some customizations include but are not limited to: Department-select scholarships or restricted to an Academic major. This can be accomplished at \$750K for the named scholarship endowment and \$30K for the companion annual.
 - Create a Presidential scholarship that provides full-tuition scholarship (or up to the amount necessary to complete the student's financial aid package) for university-wide or college-wide scholarship funding for either academic merit or financial need. This can be accomplished at \$1M for the named scholarship endowment and \$40K for the companion annual.



Scholarship Types

Endowed Scholarship- An endowed scholarship is a long-term investment that provides benefit to students, not only year after year, but generation after generation. It is a permanent gift that provides one of the most secure sources of revenue for the University. It is also a way for a donor's gift to leave a legacy at Clemson by benefitting the mission of the University and ensuring excellence in perpetuity. Several types of scholarship endowments are available and outlined within this document.

Annual Scholarship- Annual Scholarships support students now with immediate-use funding that can typically be awarded in the next academic term. While most donors choose to create an endowed gift that will last in perpetuity, some donors may choose to establish an annual scholarship by making a one-time gift each year to ensure that students can obtain a quality education at Clemson University. For additional information on Annual Scholarships, see page 22.



Scholarship Sub-Types

1. **Recruiting Scholarship:** A recruiting scholarship is available to and managed by Clemson University's Scholarship Office (Financial Aid) to recruit and retain students at Clemson University. These funds are created in order to have maximum and lasting impact on enrolling or enrolled students. Ideally, these funds are unrestricted for university-wide impact so Clemson can meet the unique and specific needs of each new incoming freshman class. Scholarships with limited or very strategic designations/restrictions can be used for recruiting.

2. **Restricted Scholarship:** A restricted scholarship is used by the Scholarship Office to provide scholarship funding for returning students and upperclassmen. These funds can have a variety of designations/restrictions and are not used for recruiting new, first-time freshmen or transfer students.
 - a. **Department Select:** This is a type of restricted scholarship where the College or Department is responsible for the selection of the student recipient(s). The Scholarship Office administers the fund distribution but is not involved in the student selection. There are also two sub-types listed below:
 - i. **Grant-In-Aid:** A grant-in-aid is financial support provided to students for their participation in a specific program or activity. To students, parents, and even many within the Clemson community, these are often lumped together in the broader definition of scholarships, but this is a unique type of student aid. An example of a grant-in-aid is those funds provided to members of the Tiger Band.
 - ii. **Awards:** The University is no longer establishing donor-directed awards. Previously established awards can continue to be funded and will be administered as outlined in the donor agreement. If a department wishes to establish a student award, they can use unrestricted or operating funds to do so, in accordance with University policy/guidelines.

 - b. **Program Specific Scholarship:** There are programs across campus that offer recruiting scholarships (or grants-in-aid) for enrolling students who are affiliated with the program. Program specific scholarship opportunities are approved through a group of Development and Alumni Relations leadership team members and members of the Provost's Leadership Team on an annual basis. Examples are: ClemsonLIFE and the Lyceum Scholars. For additional information on these scholarship opportunities and to see the full list of approved programs, see page 19-20.



The Clemson Scholarship Fund

The Clemson Scholarship Fund (fund#: B0961) is a university-wide endowment where a group of individuals come together to make a collective impact on the lives of students through one fund that provides scholarships to students in strategic and targeted areas for the University each year.

Giving to the Clemson Scholarship Fund is one of the most effective ways to make a difference in the lives of students today! Growing this scholarship fund allows Clemson to recruit the top tier students each year while remaining flexible to the composition of each incoming freshman class.

As the needs and opportunities of the University change, this endowment will provide the Scholarship Office the flexibility to respond to these changes and help our university address strategic enrollment goals. For example, the University spends \$5.2M annually on scholarships for underrepresented students. Increasing our General Scholarship Fund can help boost financial aid packages for these specific initiatives as scholarship funding needs are identified.

There is no gift minimum for a contribution to this fund.



Scholarship Funds within each College

College of Agriculture, Forestry and Life Sciences (fund#: B3351)

This scholarship endowment supports outstanding students enrolled or enrolling in the College of Agriculture, Forestry and Life Sciences.

- Endowment Value: \$820, below minimum and no current payout

College of Architecture, Arts and Humanities (fund#: B3360)

This scholarship endowment supports outstanding students enrolled or enrolling in the College of Architecture, Arts and Humanities.

- Endowment Value: \$60, below minimum and no current payout

College of Behavioral, Social and Health Sciences (fund#: pending)

- This scholarship endowment provides scholarships for students enrolled or enrolling within the College of Behavioral, Social and Health Sciences.

College of Business (fund#: pending)

- This scholarship endowment provides scholarships for students enrolled or enrolling within the College of Business.

College of Education (fund#: pending)

- This scholarship endowment provides scholarships for students enrolled or enrolling within the College of Education.

College of Engineering, Computing and Applied Sciences (fund#: pending)

- This scholarship endowment provides scholarships for students enrolled or enrolling within the College of Engineering, Computing and Applied Sciences.

College of Science (fund#: pending)

- This scholarship endowment provides scholarships for students enrolled or enrolling within the College of Science.



Named Scholarship Endowment Opportunities

A named scholarship endowment is an endowment that is created through a gift from one individual or family that will carry their name in perpetuity at Clemson. Although the donor cannot select the specific scholarship recipient, creating a named scholarship endowment allows designation(s) or restrictions(s) that direct the funds in a more specific way. As the donor continues to support their endowment over time, the fund could reach levels which offer additional designation/restriction opportunities. The Clemson Development Office sets the minimum funding levels for endowments, including scholarship endowments. Minimums for creating named scholarship endowments can be found below.

Named Recruiting Scholarships	
Endowment Minimum	Designations/Restrictions
\$25K	University-Wide
\$50K	Choose 1 Primary
\$100K	1 Primary & up to 1 Secondary or create named endowment within *established programs
\$200K	1 Primary & up to 2 Secondary
\$300K	1 Primary & up to 3 Secondary
\$400K	1 Primary & up to 4 Secondary
\$500K	1 Primary & up to 5 Secondary

Primary Designation/Restrictions:

- Academic College
- Financial Need
- In-state (South Carolina) Student
- Scholastic Merit
- Underrepresented Student

Secondary Designation/Restrictions:

- Any of the Primary- Academic College, Financial Need, In State, Scholastic Merit, Underrepresented
- Academic Department within a College (if this designation is selected, Academic College must be the Primary)
- First Generation
- Out-of-state Student (Additional \$25K to restrict to specific state)



Companion Annual Scholarship to Accompany Named Endowment:

It is highly recommended that you encourage donors to create a companion annual scholarship in addition to creating the named scholarship endowment. This ensures that scholarship dollars are available today and that they can begin experiencing stewardship and impact in the short-term. Without the creation of the annual scholarship, it could be up to 8 years before the donor is able to see the impact of their gift as their endowment generates a sufficient payout. Additional information about annual scholarships can be found on page 22.

Named Customizable Scholarships	
Endowment Minimum	Designations/Restrictions
\$750K +	Customized- requires manager & Development leadership approval; could include designations outside of primary and secondary list, such as Academic Major or Department-select
\$1M	Presidential- Full scholarships for University-wide or College and Financial Need or Academic Merit



Presidential Scholarships

Presidential Scholars- \$1M commitment

A Presidential Scholarship provides a full-tuition scholarship (or up to the amount necessary to complete the student's financial aid package) to recruit the nation's best and brightest students. By creating a prestigious presidential scholarship, the named scholarship endowment will provide university-wide or college-wide scholarship funding for either academic merit or financial need.

Many of our past Clemson University Presidents have created scholarship endowments to create a legacy and invest in the future of Clemson for generations to come. Additional donations of any amount can be made to support these scholarship funds.

James F. Barker (1999-2013)

The President James F. Barker and Mrs. Marcia D. Barker Scholarship Endowment (fund#: B3439) provides tuition assistance in the form of "completion grants" to undergraduates in good standing who encounter hardships that may otherwise impede them from graduating.

Phillip H. Prince (1994-1995)

The Prince Endowed Scholarship Fund (fund#: B1759) provides unrestricted university-wide undergraduate scholarships to attract the brightest and most promising (scholastic merit) students in South Carolina.

Walter T. Cox (1985-1986)

The Walter T. Cox Presidential Scholarship (fund#: B0663) provides opportunity for students to attend Clemson and encourage academic success. This prestigious undergraduate scholarship program will significantly strengthen Clemson's ability to recruit the most promising students in the nation.

Bill L. Atchley (1979-1985)

The Pat and Bill Atchley Scholarship Fund (Fund#: B0422) provides unrestricted university-wide support for scholarships for undergraduate students and fellowships for graduate students.

Robert C. Edwards (1958-1979)

The Robert C. Edwards Endowment for Excellence in Science and Technology (Fund#: B0484) is a multi-use fund that provides support for scholarships, fellowships, professorships, visiting professors, research, public service programs, and continuing education based on recommendations received from the President of Clemson University.



Program Specific Scholarship Opportunities

There are programs and initiatives within the university community which provide valuable recruiting scholarships to prospective students. The minimum for creating a new named scholarship endowment for these established programs is \$100,000. You can also provide financial support of any amount to the general scholarship fund within each area.

Established Scholarship Programs:

ClemsonLIFE Program

- *The ClemsonLIFE Program offers post-secondary education and a college experience to students with intellectual disabilities. Through functional academics and the guidance of mentors, students are taught to live independently, maintain successful employment, take care of their own health and wellbeing, and build and sustain healthy relationships. The Grace Catherine Clements ClemsonLIFE Endowed Grant-in-Aid (fund#: B3668) provides grants-in-aid to students that are enrolling or enrolled in the ClemsonLIFE Program at Clemson University.*

Lyceum Scholars Program

- *The Lyceum Scholars Program is a Great Books study of the moral, political, and economic foundations of a free society. A small cohort of high school senior applicants from all majors are selected each year and then take eight classes together over their four years at Clemson on topics such as Political Theory, Constitutional Law, ancient and modern philosophy, and the political ideas of Capitalism. The fund (fund#: B4112) provides scholarships to students enrolled in the Lyceum Scholars Program within the Clemson Institute for the Study of Capitalism.*

National Scholars Program

- *The National Scholars Program is a community of Clemson's best & brightest who experience an enhanced college education through in-depth personal, professional, and academic enrichment. National Scholars experience summer study abroad, substantial scholarship packages, challenging and critical thinking, and an inquisitive pursuit of knowledge. The E. Smyth McKissick III '79 Clemson National Scholars Endowment (fund#: B2971) provides support for the Clemson National Scholars program.*

Established Grant-in-aid Programs:

Clemson Corps and ROTC Program

- *Clemson Corps and ROTC Program provide a unique opportunity for both enlisted service members and interested college students to learn both academic and personal leadership skills that translate both to the Army or Air Force and to the business world. Through intellectual enrichment and rigorous physical training and challenges, ROTC Cadets develop the qualities and characteristics for a successful and influential life after college. The Quasi-Endowment for*



Air Force/Army ROTC Grants-in-Aid (fund#: B1573) provides grant-in-aid assistance to Air Force and Army ROTC students.

Emerging Scholars Program

- *Clemson's Emerging Scholars program exists to foster high-esteem for higher education among students and families in South Carolina's economically-disadvantaged school districts. Both through summer sessions and throughout the school year, relationships are established with high school students in the I-95 Corridor of Shame, and students are taught leadership skills, experience the value of the importance of learning, and encouraged to achieve college completion, whether at Clemson or another school in South Carolina. The Emerging Scholars Endowed Grants-in-Aid (fund#: B3830) provides grants-in-aid to Clemson University students who participate in the Clemson University Emerging Scholars Program.*

Tiger Band

- *Tiger Band is Clemson's nationally-renowned show of spirit, made up of the band itself, the Color Guard, Tiger Twirlers, and Tiger Dancers. Over 350 students are members of Tiger Band and perform at each Clemson football game and have played across the country at multiple bowl games and National Championship games. The CU Tiger Band Association Scholarship and Award Program (fund#: B0590) provides scholarships and recognition for participants in Tiger Band.*



Clemson Athletic/IPTAY Scholarship Program

IPTAY provides millions of dollars in support for the University's varsity sports and various other programs that enrich the lives of Clemson student-athletes.

Student-athlete scholarships are the heart and soul of college athletics and provide the resources necessary to attract top talent to Clemson University. Currently, student scholarships are IPTAY's largest budgetary item, costing approximately \$13 million a year directly from the annual fund. For long-term success in any athletics program, endowed scholarships are key. We can no longer compete at the top of our conference with schools who have well-established scholarship endowments while we remain at the bottom of the conference in scholarship endowment resources.

Endowed athletic scholarships at Clemson will help provide the resources necessary to attract the nation's most talented and deserving athletes to our University. These funds can be named in honor of the donor, a named position, or anyone the donor designates.

Athletic Scholarship Endowment Minimums:

- **A minimum of \$150,000 to establish a partial Student-athlete scholarship endowment which can be designated to a specific sport**
- **A minimum of \$750,000 to establish a named full Student-athlete scholarship endowment which can be designated to a specific sport**

Please see a member of the IPTAY team for more specific information about this scholarship program.



Annual Scholarships

Annual Scholarships support students with immediate-use funding that can typically be awarded in the next academic term. The two sub-types of annual scholarships are 1) those that are created as a stand-alone annual scholarship and 2) those which are created as a companion to a named endowment.

1. **Stand-Alone Annual Scholarship:** While most donors create an endowed gift that will last in perpetuity, some donors choose to establish an annual scholarship by making a one-time gift each year (for a minimum of 4 years) to ensure that students can obtain a quality education at Clemson University. If the donor cannot commit to 4 years, the best practice is to direct funding to The Clemson Scholarship Fund, but 1-time annual scholarships will still be accepted on a case-by-case basis.
2. **Companion Annual Scholarship:** This specific type of annual scholarship is time-limited and intended to provide scholarship support only until a named endowment generates a payout. When the endowment earns a sufficient budget, any funds remaining in this companion annual scholarship will be transferred to the endowment corpus. The typical timeframe for this scholarship to remain active is 4 years, but it could be longer depending on the investment market value of the endowment.

Annual Minimum	Designations/Restrictions
\$1K	University-Wide
\$2K	Choose 1 Primary
\$4K	1 Primary & up to 1 Secondary
\$8K	1 Primary & up to 2 Secondary
\$12K	1 Primary & up to 3 Secondary
\$16K	1 Primary & up to 4 Secondary
\$20K	1 Primary & up to 5 Secondary
\$30K	Custom *requires manager and Development leadership approval

Primary Designation/Restriction:

- Academic College
- Financial Need
- In-state (South Carolina) Student
- Scholastic Merit
- Underrepresented Student

Secondary Designation/Restriction:

- Any of the Primary- Academic College, Financial Need, In-state, Scholastic Merit, Underrepresented
- Academic Department within a College
- First Generation
- Out-of-state Student (Additional \$25K for restriction to specific state)



Constituency & Group Giving Opportunities

Clemson Alumni Clubs and Affinity Groups: Because of the varied locations and interests of members of our Clemson alumni family, we have developed clubs and affinity groups across the country to provide special opportunities to network and gather in celebration of Clemson. As of 2019, there are approximately 66 Clemson Clubs who have created 10 scholarship endowments and 32 annual scholarships. Additionally, there are 11 affinity groups, of which 5 have scholarship endowments.

- Named Endowment Minimum: \$25K
- Annual Scholarship Minimum: \$1K
- Designations/Restriction(s)- Clubs: Geographic designation/restriction to the specific area or region of the club will be allowed at the minimum shown above. If additional designations/restrictions are desired, refer to the minimum level for Secondary designations/restrictions (which starts at \$100K).
- Designations/Restriction(s)- Groups: Selection of a Primary designation/restriction will be allowed at the minimum shown above. If additional designations/restrictions are desired, refer to the minimum level for Secondary designations/restrictions (which starts at \$100K).

Faculty & Staff: We would like to applaud and encourage current, former, or retired faculty and staff members who choose to invest in Clemson students by creating scholarships!

- Named Endowment Minimum: \$25K
- Annual Scholarship Minimum: \$1K
- Restriction(s): Selection of their Academic Department will be allowed at the minimum shown above. If additional designations/restrictions are desired, refer to the minimum level for Secondary designations/restrictions (which starts at \$100K).

Student Memorial Gifts: For those families or friends who wish to create a scholarship in memory of a student, we are committed to working to help them create that legacy at Clemson.

- Named Endowment Minimum: \$25K
- Annual Scholarship Minimum: \$1K
- Restriction(s): University-wide or College-wide designation will be allowed at the minimum shown above. If additional designations/restrictions are desired, refer to the minimum level for Secondary designations/restrictions (which starts at \$100K).

Young Alumni & Current Students: As of the launch of the scholarship training in January 2020, the program (currently called the Clemson Family Endowment) is under revision and new guidelines will be published as they are finalized. In the meantime, if you have questions about a young alumnus giving to scholarships, please contact a member of the Annual Giving Team.



Frequently Asked Questions (FAQ)

What financial goal does the DAR Division have associated with this scholarship effort?

Over the life of the next capital campaign for Clemson, our goal is to secure a minimum of \$400 million in gifts and pledges in support of all types of student aid and scholarships. This will be accomplished through a combination of gifts to the endowment as well as funding the University can use today.

Does this new scholarship approach replace every other way we sell scholarships? In other words, is this the only way we are raising money for scholarships?

Yes! The details outlined in this document is our strategy for raising academic recruiting scholarships going forward. We will be focusing our training efforts on how to work with donors to accomplish this goal for Clemson.

Will there be exceptions made outside of the restrictions and levels?

No, there will be no exceptions and team members should work within the established levels and minimums. We believe that Development Officers can work with donors to find solutions that will address their passion while supporting the future of Clemson. If you are running into trouble selling scholarships, let your manager know. The team can help provide insight or strategy sessions to brainstorm solutions for the donor. Although, at the \$750K level, Clemson will work with donors on potential customized options.

Will any previous conversations be grandfathered into the prior minimums and allowable restrictions?

What is the cut-off date?

Yes, if there is a documented proposal/opportunity in the system (in any status) Development Officers will have until 6/30/20 to secure the gift for it to be grandfathered into the previous scholarship endowment levels and restrictions. If there are longer-term conversations or donor situations that need to be considered, bring those to your manager and we will address them on a case-by-case basis.

If we have such a large gap to fill, why are we asking for more money with our minimums?

We are not actually increasing our minimums or asking for more money. We are creating multiple entry points for donors to support scholarships, whether you have \$5 or \$5 million. The streamlined approach provides a simple, clear, organized, and focused path for donors to invest in scholarship endowments that will have the greatest impact for Clemson. Many of these changes are based on the feedback we received over the last few years from development officers and university administration.



How will our annual scholarships or annual scholarship renewals change?

The annual scholarship program will remain relatively unchanged. However, the revised levels and restrictions for scholarship giving will be applied to all annual scholarships and student support types going forward. New funds will be aligned to the revised scholarship endowment minimum levels and allowable restrictions. All previously established annual scholarships will be grandfathered until funding ceases and the fund is closed.

I have seen in the annual endowment statement that our endowment has 34% designated to student financial aid, but only 15-20% can be used for recruiting...I'm confused?

The Clemson University Foundation (CUF) endowment is comprised of approximately 34% of funds that are designated for student financial aid. It is important to understand that student financial aid includes ALL types of aid, including scholarships, fellowships, grants-in-aid, and student awards. When talking about only endowed undergraduate scholarships, that number drops to 26%. Then remove the restricted and department-select scholarships and you get the remaining 15-20%, which are available for the Scholarship Office for recruiting.

Are certain colleges at a disadvantage for raising scholarship dollars and impacting their student populations because their alumni don't have as great of an earning potential?

*Our priority is growing The Clemson Scholarship Fund so that students from **all** colleges can benefit and no college is at a disadvantage. The college restriction minimum has not changed (\$50K to create a named endowment designated to a college). Because each college will have the ability for donors to give to their respective college scholarship endowment no matter what size gift, all donors can make an impact on the college. The collective power of smaller gifts can be very powerful. If a donor's passion is to support a specific college, and they are unable to meet the minimum today, look for ways for them to begin making an impact today and fulfil that passion through a longer-term plan.*

In several instances within the document I've seen the term "sufficient payout"- what does that mean in relation to scholarship endowments?

The term sufficient payout refers to the level that is required by the Scholarship Office to award a scholarship for the academic term. The current minimum for a scholarship to be awarded is \$500. If the scholarship endowment earns less than that amount in the first payout year, it is considered insufficient to award and funds would remain in the endowment until the following awarding cycle.



Why are we putting more restrictions on donors?

We are not putting more restrictions on donors. Creating a layered approach to scholarship support is going to provide the most impact, both immediate and future, for Clemson. We understand that some donors may have a vision of how a scholarship should look, with a specific student population in mind. It is our responsibility to help guide them to see how they can invest their funds in ways that will guarantee impact and meet the needs of the University. If the answer isn't supporting scholarships, then perhaps they can make an impact through program or departmental support instead.

How were the minimums and giving levels set?

Our minimum and giving levels were established by looking at our current framework, comparing peer benchmark data and internal data from our Scholarship Office. We also heard feedback over the past several years from Development staff that there wasn't a clear path for donors to support scholarships. As you know, minimums and giving levels have always been a part of the culture of this organization, but with this initiative, we have created clearer entry points and opportunities for impact at multiple giving levels.

My donor is a graduate of the Calhoun Honors College (CHE), but I don't see it listed in the College general funds or on the established programs list?

The established programs contained within this overview document are the programs that offer recruiting scholarships or grants-in-aid. Based on the current admissions structure of the Calhoun Honors College, students receive their financial aid packages prior to applying or receiving admission to CHE. Additionally, due to the caliber of students being selected for CHE, these students are typically already being considered for and awarded recruiting scholarships. In this case, the donor may want to explore opportunities to directly support the Honors College programs versus creating a scholarship.

Why are minimums increasing for creating a named scholarship endowment and for creating a named scholarship endowment within several established scholarship programs?

The minimum for creating a named scholarship endowment is not changing and still remains at \$25K for university-wide impact. The minimums for creating named scholarships within the established programs also remains relatively similar in most cases. One of the goals and objectives with our approach to scholarships is to create consistency and "level the playing field" for all programs across the campus. Having consistent minimum levels for all of these scholarship programs ensures that we are not valuing one program over another and allows for clarity and transparency with staff and donors.

Why is it more money to name the specific state?



Restricting scholarship funds to a specific state conflicts with the University's financial aid strategy. Every additional restriction limits our ability to utilize funds to support a diverse freshman applicant pool, which affects our ability to maximize philanthropic impact. Due to our ever-changing applicant pool, we don't always know if the freshman population will support specific state requirements, potentially leaving scholarship funds unawarded.

What is the definition of an underrepresented student? Can a donor support a specific type of diverse student?

The University's current definition of underrepresented student includes those who are: Native American, Hispanic, and African-American. This definition is subject to change and shift over time based on the dynamic student population of Clemson University. The scholarships will be awarded based on the evolving definition of underrepresented and not the definition in place at the time the scholarship was created. While a donor cannot designate one population, their gift will allow a vast number of underrepresented students to obtain a Clemson education. Being too specific could lead to stewardship issues if that population is ever removed from Clemson's definition of underrepresented. In some cases, the inclusion of a specific population can jeopardize our ability to receive federal funding for scholarships.

How does the University and each academic unit benefit from this approach to scholarships?

The reason for this shift in scholarship fundraising is to create greater immediate and long-term impact for all colleges and units. In working with the ClemsonForward team across the University, it became evident that we need to focus our scholarship fundraising to allow the University the greatest flexibility to recruit students. We believe in this revised approach, fewer scholarship endowment dollars will be left unspent each year and thus more students will be impacted by our donors and their generosity.

Who will decide how the scholarship dollars are spent? How will they make those decisions? What is the overall awarding philosophy?

The overarching philosophy is to use scholarship dollars to recruit and retain Clemson students. At Clemson University, recruitment scholarships are managed and awarded by the Scholarship Office within Financial Aid. Scholarship dollars will be awarded based on strategic priorities defined by the Provost's Office in collaboration and partnership with Academic Deans and Financial Aid based on each incoming class.

Will we have a new gift/fund agreement as part of this program? When can I show a draft of the agreement to a donor?

A new format is being approved now for gift/fund agreements. The donor should not see the agreement until after ALL internal approvals have been obtained.

What is the distinction between a major vs. department?

A department is a collection of majors. The university has asked Development to move away from



awarding scholarships based on majors to prevent potential issues in stewardship since the scholarship remains with the student all four years of their academic career, despite major changes. The university would like to ensure that a student is never penalized for their decision to change majors. Additionally, departments tend to shift less frequently than majors and minors.

Why are Financial Aid selected scholarships preferred to Department-select scholarships?

Department-select scholarships provide an opportunity for faculty members to reward and recognize the students they feel are most worthy of those specific scholarships, based on the criteria outlined in the individual fund agreements. However, these are awarded to returning students only and therefore cannot be used for recruiting. Additionally, there are several reasons that make Financial Aid selected scholarships more desirable at the macro level. Financial Aid sees fiscal details regarding the student's need that are not available to departments and are able to make the most unbiased opinion regarding the awarding of scholarships. Lastly, the decentralization of scholarship awarding to dozens of different departments requires a significant amount of administrative oversight, which can result in missed deadlines and unawarded scholarships for our students.

What is the average scholarship award package for (a) in-state students and (b) out-of-state students?

- a)** *The average in-state scholarship package varies when you consider the inclusion of State scholarships (Palmetto Fellows, LIFE) and CU only scholarships*
 - *CU only scholarships = \$3,560*
 - *CU & State scholarships = \$5,497*
- b)** *The average out-of-state scholarship package*
 - *CU only scholarships = \$10,797*

What is the expected donor experience when they support scholarships at Clemson?

The expected donor experience is that they feel gratitude for the investment they have made in the lives of Clemson students and that they feel connected to the students impacted by their philanthropy. The Office of Central Donor Relations has developed a list the full menu of donor engagement/activities that align with the donor's gift purpose and size. See Appendix 4 on page 34-35.

How will group or collective giving be handled?

One gift agreement will be written to set up the applicable funds. One or two people should be listed as the contacts to represent the group. All gifts will be applied towards endowment minimums.

Can corporate matching be counted towards the minimums?

Corporate matching can be counted towards minimums, but not towards a donor's personal pledge. Gifts from all parties are applied to the corpus, which is used to calculate the endowment minimum. As a



part of the gift agreement, the donor must acknowledge that if the corporate funding ceases that they would increase their personal giving to make up the difference and maintain the endowment minimum.

How will we recognize donor stories within the scholarship program?

For general scholarship endowments, we plan to celebrate the overall impact of scholarships on Clemson students and highlight students within each of our general scholarship funds. Messaging will include statements like “your generosity has impacted students like..”.

For named endowments, we need a better way of communicating donor stories to the students impacted. Currently, we are exploring ways to document the donor story so that future recipients understand who the person/people were and why creating the scholarship was important to them. This will ultimately strengthen the culture of philanthropy as students begin to see donors as ‘real people’.

For all scholarships, we need to do a better job of communicating aggregate information to students about how the process works and the total amount of scholarships awarded. Including donor success stories in email, web, and print communications will allow us to build a strong philanthropic culture within our student population.



Appendix 1: Quick Reference Guide of Realignments

Current State	Realignments	Page #
No concentrated fundraising effort to increase the Clemson Scholarship Endowment. Current endowment value is \$2.1M with only a \$71K payout.	High priority on growing our Clemson Scholarship Fund and creating additional opportunities for donors to provide unrestricted recruiting scholarship support to Clemson University.	Page 14
Only a handful of Colleges have a scholarship fund and there is not a concentrated effort to grow those endowments	Created funds in all colleges and creating opportunities for donors to provide recruiting scholarship support to Academic Colleges.	Page 15
Named Endowment Minimum = \$25K with several special restrictions requiring no additional investment (Ex. Diversity)	Still \$25K minimum, but no designations/restrictions at that level. Minimums range from \$25K to \$750K. Over time donors can make additional deposits to corpus in order to reach thresholds for a designation/restriction. A fund agreement revision can be made at that time.	Page 16-17
Wide selection of restrictions	Narrowed to a strategic list of 8 designations/restrictions (some primary and some secondary) starting at a \$50K minimum.	Page 16-17
Companion annuals are currently optional when closing an endowment	Recommended best practice when selling scholarships is to close the endowment AND companion annual so the donor can begin providing support and receiving stewardship immediately	Page 16-17
Annual Scholarship minimums and restrictions don't align with endowment minimums	Aligned minimums and restrictions to the endowment levels. Best practice is a 4-year minimum commitment for all new annuals. The 4-year commitment is important because the scholarship is awarded to a student for 8 semesters.	Page 22
The minimum for programs to create a scholarship is \$50K. Ex. Gospel Choir and Tiger Band	There are now 6 programs where donors can create new recruiting scholarships/grants-in-aid. The minimum for a named scholarship within these programs is increasing to \$100K. Programs who wish to have their program considered for the approved established program list can submit them to Development leadership for review.	Page 19-20



Appendix 2: Named Scholarship Minimums and Designations/Restrictions Chart

Named Recruiting Scholarships		
Endowment Minimum	Annual Minimum	Designations/Restrictions
\$25K	\$1K	University-Wide
\$50K	\$2K	Choose 1 Primary
\$100K	\$4K	1 Primary & up to 1 Secondary or create named endowment within *established programs
\$200K	\$8K	1 Primary & up to 2 Secondary
\$300K	\$12K	1 Primary & up to 3 Secondary
\$400K	\$16K	1 Primary & up to 4 Secondary
\$500K	\$20K	1 Primary & up to 5 Secondary

Named Customizable Scholarships		
Endowment Minimum	Annual Minimum	Designations/Restrictions
\$750K +	\$30K	Customized- requires manager & Development leadership approval; could include designations outside of primary and secondary list, such as Academic Major
\$1M	\$40K	Presidential- Full scholarships for University-wide or College and Financial Need or Academic Merit

Designations/Restrictions	
Primary	Secondary
Academic College	Any of Primary – Academic College, Underrepresented, South Carolina, Financial Need or Scholastic Merit
Underrepresented Student	Academic Department within a College (if this designation is selected, Academic College must be the Primary)
South Carolina Student	Out of State (specific state is \$25K additional for endowment or \$2K for annual)
Financial Need	First Generation
Scholastic Merit	

***Established Scholarship or Grant-in-Aid Programs:** ClemsonLIFE, Lyceum Scholars, National Scholars, Clemson Corps and ROTC, Emerging Scholars, and Tiger Band



Appendix 3: Glossary of Terms

Academic College: Currently, there are seven (7) academic colleges at Clemson which are organized around subject matter and under the leadership of Deans. The colleges are the units from which students receive their degrees and are divided into departments.

Academic Department within a College: An academic department is within a college and is comprised of a group of majors that are aligned to a specific discipline.

Annual Scholarship: Annual scholarships support students with immediate-use funding that can typically be awarded in the next academic term, but do not exist in perpetuity.

Awards: The University is no longer establishing donor-directed awards. Previously established awards can continue to be funded and will be administered as outlined in the donor agreement.

Department Select: This is a type of restricted scholarship where the College or Department is responsible for the selection of the student recipient(s). Only returning students and upperclassmen are eligible.

Designation or Restriction: Donors can restrict whom may benefit from the gift (i.e. the type of student whom would be eligible to receive the scholarship), provided that such beneficiary group is not too small.

Endowed Scholarship: An endowed scholarship is a long-term investment that provides benefit to students, faculty or programs year after year, generation after generation. It is a permanent gift that provides one of the most secure sources of revenue for University scholarships.

Financial Need: A student's financial need is calculated by the Cost of Attendance at Clemson (including room/board) minus the Expected Family Contribution from the FAFSA minus outside scholarships & other resources. That value represents the Financial Need and the types of financial aid resources that could be available to them.

First-Generation Student: Being a first-generation (often shortened to first-gen) student means that the student's parent(s) did not complete a 4-year college or university degree. They could have an associates or technical degree and the student is still considered first-generation.

Grant-In-Aid: A grant-in-aid is department-select student aid that provides financial support to students for their participation in a specific program or activity.

In-state Student: In-State student refers to the student whose primary residence (and/or their parent/guardian's primary residence) is within the State of South Carolina. Residency status is determined by the Office of Residency Classification and regulated by the State of South Carolina and the Commission on Higher Education.



Out-of-state Student: Out-of-State student refers to the student whose primary residence (and/or their parent/guardian's primary residence) is NOT within the State of South Carolina. Residency status is determined by the Office of Residency Classification and regulated by the State of South Carolina and the Commission on Higher Education. This category also applies to International students.

Program Specific Scholarship: There are programs across campus that offer recruiting scholarships (or grants-in-aid) for enrolling students who are affiliated with the program.

Recruiting Scholarship: A recruiting scholarship is an unrestricted or minimally restricted scholarship that is available to the Scholarship Office (Financial Aid) to recruit and retain students at Clemson University.

Restricted Scholarship: A restricted scholarship is used by the Scholarship Office to provide scholarship funding for returning students and upperclassmen. These funds can have a variety of restrictions and are not used for recruiting new first-time freshmen or transfer students.

Scholastic Merit: Scholastic Merit refers to students who are academically high-achieving in the areas of high-school class rank, GPA, or standardized test scores.

Underrepresented Student: The University's current definition of underrepresented student includes those who are: Native American, Hispanic, and African-American. This definition is subject to change and shift over time based on the dynamic student population of Clemson University.



Appendix 4: Stewardship Touchpoints

The Clemson Scholarship Fund and College Scholarship Funds Stewardship:

The focus on University-wide and College-wide scholarship endowments allows Clemson the opportunity to create new and unique donor experiences, meaningful stewardship and engagement opportunities, and demonstrate collective impact on the lives of students. Below is a list of potential stewardship touches donors will receive throughout the year (purple text indicates NEW touchpoints for scholarship donors):

- Scholarship video from a student at beginning of fall semester (August)
- 30 second thank you video from a student once gift is posted
- Video update from President on fundraising status/update from prior fiscal year (September/early October)
- Gratitude Message/Impact report with data points featuring student/students being supported (late November)
- Scholarship event for Clemson Scholarship Fund donors at certain level- level tbd (February)
- \$50k and up invited to UW or College-based donor appreciation events (Spring)
- Graduation Announcement or thank you note from graduating scholarship recipient, varied by college (April)

Named Scholarship Endowment Stewardship:

The named scholarship endowments will continue to receive many touchpoints throughout the year that introduce them to the student recipient(s) of their scholarship. Below is a list of stewardship touches donors will receive throughout the year (purple text indicates NEW touchpoints for scholarship donors):

- Scholarship video (August)
- Donor notification letter (Oct)
- Endowment statement (Nov)
- Student Profiles (Spring)
- UW/College-based Donor Appreciation Events
- Graduation Announcement including and thank you note from a graduating student, varied by college (April)



Stewardship Touchpoints	Estimated Timing	General Scholarship & Established Program Endowments	Named Endowments	\$1 M to \$2,499,999	\$2.5 M+
Thank You Video from Student	When gift is booked	X			
Scholarship video featuring student	August	X	X	X	X
Video Update from President on fundraising status/prior fiscal year update	September/October	X			
Donor Notification Letters	October		X	X	X
Gratitude Message/Impact Report with data points and student profile	November	X			
Endowment Statement	November		X	X	X
Clemson Scholarship Fund (all donors above certain gift level- level tbd)	February	X			
Student Profiles	March		X	X	X
Pre-Reception for VIPs	Spring			X	X
Donor Appreciation Events	Spring	\$50k and up	X	X	X
Graduation Announcement/Thank You Note	April	X	X	X	X
Customized Donor Experience	Varies				X

Notes:

- Purple denotes NEW Stewardship Touchpoints for Scholarship Donors
- Existing donors with scholarship funds/endowments will be stewarded the same way as new donors with Named Endowments.



Appendix 5: Endowment Comparison Chart

University	Endowment Size (as of June 2019)
University of Virginia	\$9.6B
University of North Carolina- Chapel Hill	\$3.4B
Georgia Tech	\$2.1B
University of Florida	\$1.8B
North Carolina State	\$1.4B
University of Georgia	\$1.4B
Virginia Tech	\$1.3B
University of Alabama	\$989M
University of South Carolina	\$810M
Auburn University	\$807M
Clemson University	\$775M
Florida State University	\$715M