Scholarship Manager:
Meeting the Needs of Institution Administrators and Advancement/Foundation Teams

An NSPA Promotional Webinar
Your Presenters

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Today’s Agenda

- How are institutions organized to support scholarship administration?
- Review system capabilities, flexibilities, and usability to support varying institution and foundation needs
- Student, Reviewer, Donor and Administrative Portal overviews
- Scholarship Manager Demonstration
- A University’s View of the Benefits of Scholarship Manager
- Q&A
About Next Gen

Each individual has a right to equitable access to pursue higher education.

This is our belief, and, since 2008, this belief has fueled our pursuits as a contributing member of the higher education community. Next Gen Web Solutions’ mission is to create and manage applications and services which allow individuals to more easily access their goal of a higher education.
NSPA Statistics

Scholarship Administrative Structure
- Centralized: 36%
- Decentralized: 21%
- Mix of Both: 44%

Departments Within Institutions Organizing Scholarships
- Enrollment Management: 33%
- Financial Aid Office: 74%
- Foundation or Alumni Association: 46%
- Scholarships Office: 46%
- Specific Department, College, or School: 44%
- Student Affairs: 26%
- University Finances: 8%
- Other: 8%
Product Overview – 10,000 Foot View

Smart Scholarship Application
Reference Letters and Documentation

Data Import

Search Scholarships
Meet the Donors

Automated Matching Engine

GPA 3.5
Major=Science
Major=Math
ACT Composite Score = 21
Character Essay

Analytics and Custom Reports

Scholarship Requirements

Committee 1
Freshman Merit
Freshman Need

Committee 2
School of Nursing

Committee 3
College of Business

Validate Vs Need

Award Notice
Post Award Forms

Committee 1
Committee 2
Committee 3

Donor Portal

Real time updates to client system(s)
The Non-Negotiables

- Multi-year solution
  - Do not archive your data (by default, keep seven years’ worth)
  - Review and award in two Academic Years simultaneously
- ADA/508 compliant
- Responsive Design (User Experience adjusts to Device Being Used)
- Uptime > Over 99.85% historically since 2008
- Data Protection:
  - Own storage/databases where data is stored
  - Never share data
  - Data encrypted throughout lifecycle
  - Multiple third-party audits
System Access

Student Login Options
- Single Sign On (Pass Thru Authentication)
- Manual Account via Scholarship Manager
- Validated Manual Account via Scholarship Manager
- Blended (both SSO and Manual)

Administrators/Faculty/Staff
- Single Sign On (Pass Thru Authentication)
- Direct via Scholarship Manager

External Reviewers/Donors
- Direct via Scholarship Manager
User Access

Types of User Accounts:  Student  Administrator  Reviewer  Donor

At the individual user level, great flexibility to customize access for an individual user, to a very granular level, e.g.:

- Foundation/Advancement users that must be restricted from accessing certain student information can have their access configured to limit them to donor stewardship functions.
- A Reviewer can be either a committee member or a committee chairperson. The committee member can view committees that they are assigned to and evaluate and score scholarship candidates. Chairpersons have more permissions and are able to award candidates. This type of flexibility allows clients to use the system to meet their needs, e.g., distributed review with centralized reporting. It is not an all or nothing; some departments/users could have access to distributed review and awarding while others are restricted to review only.
- Staff members who provide student customer support can be given “view only” access to the Applicant Snapshot which is a great feature to view everything regarding the student in one place.
- A staff member only has access to enter the annual fund amounts.

At the functional level:

- Scholarship Setup.....can create groups and assign scholarships and users to the group.
- Candidate Review.....assign scholarships and users to a specific committee. Upon login, the user will be limited to accessing the committee(s) to which he/she is assigned.
System Integration

Scholarship Manager System Integration

- Student/CRM
  - Banner
  - Colleague
  - Power Campus
  - Oracle PeopleSoft
  - Jenzabar
  - PowerFAIDS
  - Workday
  - Home Grown
  - CRM Advance
  - Salesforce
  - Slate
  - Etc.

Can accept import files from multiple systems.

- Scholarship Manager
  - Send award and donor appreciation (thank you) information.
  - Batch and Real Time Updating Options

- Donor Management
  - Receive donor information.

- Fund Financials for Stewardship Reporting
  - Send recipient information.

ORACLE Gold Partner

Next Gen is the only scholarship software provider that is an Ellucian partner and is also Ellucian Ethos Connected. Of Ellucians’ 141 partners, only 20 have achieved Ellucian Ethos Connected status.
Product Capability – Student Application Workflow

- Students can be presented with:
  - one comprehensive application
  - a core application and then sub-application(s) based upon their specific background
  - all the way down to the individual scholarship level if needed
- No pre-requisite application constraints; no limit on number and type of applications
- Smart logic tailors the application to a student’s unique experience
- Eliminates redundant questions – reducing the hoops students need to jump through
- Application workflow automatically shows specialized scholarship applications to eligible students only
  - they do not have to search for or select appropriate application(s)
  - any required applications are automatically presented on the student portal home page
- Institution can send student information system data via nightly feed which greatly reduces the student self-reported data requirements
- Easy to add new questions to the application(s) and data feed as new opportunities present
- You can tell the system when to close an application; you do not have to worry about removing a URL or asking customer service to close the application for you
- You can open an application where the due date is past at the INDIVIDUAL STUDENT/APPLICANT level.

*Students can be matched to scholarships without need for application; based simply on data imported from student system or a combination of imported/student supplied data
Scholarship Criteria Types:

**Hard Requirements**
In Scholarship Manager, a hard requirement is an attribute of an applicant that absolutely must be met in order to be considered for a given scholarship. An applicant will have to meet all hard requirements in order to be matched with a scholarship.

**Soft Requirements**
A soft requirement is an attribute about the applicant that the donor prefers but is not a requirement to be selected for the scholarship. An applicant who does not meet any of the soft requirements but does match on all the hard requirements will still be eligible for the scholarship and will appear in the list of qualified candidates. A difference between hard and soft requirements is that Scholarship Manager allows Administrators to assign a point value to each soft requirement (preference). When a scholarship possesses multiple soft requirements, applicants can be ranked depending on the soft requirements they meet and the associated point value.

**Renewable Requirements**
A renewable requirement is a hard requirement used to match awardees in subsequent years of a renewable scholarship. The renewal requirement may or may not be the same as the inaugural year hard requirement.

Example:

- Hard requirement: GPA >= 3.5
- Soft requirement: County = Hartford County, award 10 points
- Renewable requirement: GPA >= 3.0
Matching occurs on two levels:
(1) to identify what applications or opportunities a student needs to apply for and
(2) to identify candidates for the award process.

Touchpoints for matching:
• When a student logs in so that the system knows what applications or opportunities to present
• When a student completes an application to identify all scholarships for which the student is a candidate (this also combines imported student data in the logic)
• When the student accesses their qualified opportunities
• Globally for every scholarship, by committee, or by specific scholarship
Product Capability – Funds Management

A critical aspect to Scholarship Manager’s review and awarding functionality is real-time fund management. A summary of the monetary status is presented at the top of the candidate list, to include:

- **Total Fund Amount**: The total amount of dollars available for fund in Academic Year
- **Awarded Amount**: Amount already awarded to candidates in Academic Year
- **Encumbered Amount**: Amount that is allocated to renewable candidates
- **Available Balance**: Total fund amount minus the awarded plus encumbered monies
- During review process, can see in real time all scholarships a particular student has been awarded
Dynamic Forms is an enterprise wide solution that can be used across departments – virtually any office within your organization that would like to turn a paper form into an electronic form, reducing errors and increasing productivity. Includes electronic signature, smart form functionality, and sophisticated document workflow. It can be licensed at a department or organization level. We also offer a limited Scholar-Forms license.

Some of the current uses of Dynamic Forms with Scholarship Manager:*

- Scholarships that require a signed Agreement post-award (this integration truly gives you end-to-end automation of your scholarship process)
- Dynamic Forms can then integrate to export the forms to the institution’s imaging system
- Release forms that require signature
- Department requests to administrators to grant campus users committee access
- K-12 scholarship application fee payments via Dynamic Forms/PayPal

*Dynamic Forms License Fee depends on use of the product.
STUDENTS CAN

- EASILY see what they need to do and when it must be done
- Complete applications
- Automatically see all scholarships for which they are candidates
- Manage third party recommendations
- Accept awards and complete any post-award requirements, e.g., thank you letter, student bio, award agreements (with electronic signature)
- Find out about miscellaneous events, e.g., award luncheon
Committee members review candidates at their leisure, from anywhere, in a straight-forward, easy-to-read format.

- Client customizes rankings that committee members complete; option for global rankings and comments (committee members rankings and comments are shared across all scholarships).
- Can receive meeting notices and emails.
- Controlled permissions:
  - Present just those scholarships that a reviewer needs to see.
- Matching function ensures readers only see qualified candidates for a fund.
- Customized reviewer views:
  - Administrators are able to control the data points displayed to the reviewer.
- Scoring systems set up to aid with the review process.
- Review candidates in multiple years.
Facilitating Donor Stewardship via the Donor Portal

DONORS CAN

• See your message of appreciation, latest news, event invites, etc.
• Register for events from the portal
• View recipient thank you letters and background Q&A which is collected via Scholarship Manager thus saving the client having to chase down students to get the donor appreciation documents completed
• View up to three years’ fund financials

ADMINISTRATORS CONTROL

• When data is published to the portal
• Inviting donors to create a login and when termination of access is required
Administrative Portal

- Easy to navigate
- Customizable home page dashboard with key performance metrics
- Administrators can choose interactive performance charts
Support and Project Team

GO LIVE!
- Average 16 weeks
- Date is always client driven
- Variable: Client resources

Testing
- Test data imports
- Test applications
- Pilot group?
- Training

Data Imports
- Set up SFTP folders
- Test data import process
- Schedule
- Test / Train

Load Scholarships
- Load from Excel
- Create shell
- Add requirements
- Training

Kick Off Call
- Identify team
- Discuss scope
- Provide prior applications
- Provide list of scholarships
- Training

Site Creation
- Create website
- Apply database
- Apply web-skin
- Authentication
- Training

Identify Criteria
- External Data, e.g.,
  - Student Info System
  - Online application
  - Training

Data Mapping
- Map external system data
- Training

Create Applications
- Create student applications
- Smart application logic
- Training

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Thank You

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