



University of Colorado **Denver**

Scholarship Working Group Report

BACKGROUND AND PURPOSE

CU Denver administers more than 275 scholarships to students. Some scholarships are administered within the Financial Aid and Scholarships Office, while others are managed and administered at the school, college, or program level. The varied timelines, processes, functional units, and people involved in the administration and stewardship of scholarships have led to challenges, inefficiencies, and insufficient service to our students and scholarship donors.

To improve the administration and management of scholarships across the university, a [Scholarship Working Group](#) was established in December 2023 to identify issues and provide recommendations to Provost and Executive Vice Chancellor of Academic and Student Affairs Constancio Nakuma and Managing Executive Counsel Chris Puckett on actions to resolve issues associated with scholarships.

The mission of the Scholarship Working Group was to develop a plan that would immediately address scholarship management operational efficacy, stewardship, and administration across the university. Particular emphasis was placed on coordinating functions and staff support within central units and colleges/schools to ensure excellent student service.

The Scholarship Working Group was comprised of team members across the university with knowledge and expertise in administering and managing scholarships. Its members were:

- Pamela Toney, Associate Vice Chancellor, Enrollment Management (Leader)
- Tawnya Boulier, HR (prior member of the Scholarships Unit)
- Jacqui Gatlin, Bursar
- Ryan Grodman, Director of Financial Aid
- Mollie Loiselle, Associate Director, Donor Engagement, Advancement
- Heather Peterson, Director of Compliance & Quality
- Scott Webb, Assistance Vice Chancellor, Advancement Operations
- Chris Puckett, Managing University Counsel (Executive Sponsor)

Beyond the core membership, the group also engaged with those who support the administration and management of scholarships for schools, colleges, and programs.

The group's scope included a review of the policies, processes, and systems used to administer scholarship awards. The group also was responsible for:

- 1) Conducting a thorough analysis of the scholarships unit, including the policies, processes, and systems used to administer scholarships, and identifying deficiencies
- 2) Identifying root causes and potential solutions to address the deficiencies
- 3) Collaborating with stakeholders from schools and colleges to gather insights and feedback
- 4) Developing an action plan and presenting recommendations for implementation

The work continued through March 2024. The team engaged in weekly discussions, working sessions, and two feedback forums to gather information and review operations, policies, and procedures.

The group identified four primary issues underlying student and other stakeholder problems with delays in awarding and disbursing scholarships. By addressing these issues, we will vastly improve the operations and efficacy of scholarship administration and stewardship and provide a better experience for our students while also ensuring the timely distribution of scholarship funding.

The four issues identified were:

- **Lack of Standardization and Consistency:** Scholarship administration processes and timelines vary across different administrators and units, creating confusion among students and staff. The tools and processes used to identify and award scholarship recipients, particularly recruiting and admission scholarships, are inconsistent. The current decentralized approach leads to inefficiencies and difficulties in managing scholarship processing timelines, procedures, and outcomes.
- **System and Access Issues:** Challenges related to system access, role assignment, and integration indicate a need for improved infrastructure and clarity in user permissions. Additionally, limitations with existing system integration need to be addressed to support smoother operations.
- **Resource and Training Deficiencies:** There is a lack of resources and training to support the proper use of scholarship administration systems. This gap in knowledge affects the ability to correctly set up, process, and move scholarships through the system, hindering effective scholarship management.
- **Communication and Support Challenges:** Due to the various methodologies across campus, effective support for student inquiries is lacking. Students submit questions through multiple channels, resulting in inconsistent outcomes and experiences. Additionally, there are issues related to reporting and notifications within the donor stewardship system.

Working Group Recommendations

These recommendations were put together on the basis of our current resources and staffing.

Lack of Standardization and Consistency

- Reinforce usage of Scholarship Universe as the recommended system of record for all scholarships
- Standardize timelines for scholarship processing across all units
- Develop a guide documenting standard processes that all administrators and units should consistently follow

System and Access Issues:

- Define user roles and access levels
- Develop user-specific guides to outline responsibilities and procedures within Scholarship Universe
- Utilize a ticketing system or other process to streamline issue resolution for students and staff
- Work with Advancement database vendor Ellucian to create an ongoing consultancy process to address configuration and integration issues

Resource and Training Deficiencies:

- Update the scholarships website to clarify scholarship availability and timelines Create a webpage to consolidate information from across campus into a single location (it can link to external sites, but scholarship content should be accessible from one place)
- Develop a resource guide to consolidate scholarship information from across campus into a single location (it can link to external sites, but scholarship content should be accessible from one place)
- Develop and coordinate training to support the onboarding of new team members (CU-SIS, COGNOS, Scholarship Universe, CU Foundation, etc.)

Communication and Support Challenges:

- Create an ongoing Scholarship Committee with campus stakeholders to evaluate the effectiveness of operations, engage in continuous improvement efforts, coordinate change management, and resolve issues in a more timely fashion
- Create a communication lifecycle template and ensure all communications out of Scholarship Universe are reviewed/updated annually
- Develop consistent reports within CU-SIS to facilitate information-sharing and reconciliation

- Create scholarship dashboards that provide information on the outcomes and performance of students receiving scholarships

Action Plan, following approval of recommendations:

Within 30 days

- 1) Establish a Scholarship Committee for ongoing work and assessment
- 2) Create a communications plan to inform the community of the recommendations.

Within 60 days

- 1) Document campuswide protocols for scholarship administration
- 2) Draft policy that reinforces to all campus constituents the need for Scholarship Universe to be the sole system for scholarship administration at CU Denver
- 3) Communicate scholarship processing timelines (see Appendix A)
 - a. Create a decision tree for scholarship administration outlining when to use Scholarship Universe, the Scholarship Load Form, and Departmental Invoices to ensure consistency in how requests are directed

Within 90 days

- 1) Create a communication lifecycle template and ensure all communications out of SU are reviewed/updated annually
 - a. Analyze existing email content and cadence in Scholarship Universe and determine if additional communication needs to be created
- 2) Develop consistent reports within CU-SIS to facilitate information-sharing and reconciliation
- 3) Determine existing support included in the contract with Ellucian and evaluate the cost of setting up an ongoing technical support contract

Within 6-12 months

- 1) Create Resource Guides
 - a. Develop Scholarship Universe-specific user guides that support the different roles within the system
 - b. Develop Scholarship Universe online training to support the onboarding of new team members
- 2) Develop an online training course (composed of written materials and video recordings) to support the onboarding of new team members related to CU-SIS, COGNOS, Scholarship Universe, and the CU Foundation
- 3) Create scholarship dashboards that provide information on the outcomes and performance of students receiving scholarships
- 4) Review available options currently utilized across campus for ticketing and determine if existing technology can be adopted to address scholarship questions and resolve issues

- 5) Identify existing tools used across campus to identify, review, and organize pre-enrollment scholarships and identify a single tool for use by all stakeholders

Ongoing Actions:

- 1) Conduct Scholarship Committee meetings
- 2) Update the annual scholarship timeline and processing dates
- 3) Execute an annual review cycle for departmental policies and procedures
- 4) Work with Ellucian to create an ongoing consultancy process to address configuration and integration issues

Appendix A: Scholarship Process Proposed Timelines

Student experience

- 1) Student applies for scholarships through Scholarship Universe
- 2) Student receives an award notice, if selected
 - a. Students who were not selected will receive notification upon application closing
- 3) Student completes a thank-you note (if required by scholarship)
- 4) Student can view aid on award letter and in CU-SIS
- 5) Student receives disbursement

Scholarship Timeline

Fall: *scholarships to be disbursed in Fall and Academic Year*

- Scholarship Applications Open: Nov. 1
- Applications Close: March 1 (UCCS goes until May, Boulder until March 15)
- Committee Review and Selection: March 1 – 31
- Scholarships Awarded: April 1 – 30
 - Reopen scholarship applications that weren't fully awarded (2nd Round): April 1 – May 15
 - 2nd Round committee review and selection: May 15 – June 15
- Scholarships Disbursed/Census: August/September

Spring: *scholarships to be disbursed in Spring only*

- Scholarship Applications Open: May 1
- Applications Close: Sept. 1
- Committee Review and Selection: Sept. 1 – 30
- Scholarships Awarded Oct. 1 – 31
 - Reopen scholarship applications that weren't fully awarded (2nd Round): Oct. 1 – Nov. 15
 - 2nd Round committee review and selection: Nov. 15 – Dec. 15
- Scholarships Disbursed/Census: January/February

Scholarship Process

1) Pre-Application Setup

- a. Advancement provides budgeted dollars for advancement scholarships and the name of the funds manager
- b. School and college designees provide list of scholarships, budget, ItemTypes & speedtypes
- c. FASO sets up award cycles, scholarship information in Scholarship Universe, and general applications

- d. When: Information is required at least two weeks prior to opening (Oct. 15 for Fall, April 15 for Spring) to ensure Scholarship Universe setup is complete before opening date
- 2) Open scholarship applications**
 - a. Who: FASO and/or school/college designee
 - b. When: Fall: Nov. 1; Spring: May 1
- 3) Set up scholarship review committees in Scholarship Universe**
 - a. Who: FASO or school/college designee
 - b. When: Fall: Between Nov. 1 and Feb. 28; Spring: Between May 1 and Aug. 31
- 4) Applications are reviewed and scored by the committee**
 - a. Who: Committee members
 - b. When: Fall: March 1 – 31; Spring: Sept. 1 – 30
- 5) Award recipients are selected**
 - a. Who: FASO or school/college designee
 - b. When: Fall: April 1 – 10 for students who require a needs analysis; Spring: April 1 – 30 for non-need scholarships
 - c. For scholarships that require a needs analysis (ideally, information is available within Scholarship Universe), the scholarship designee would need to provide a list of recipients to FASO by April 11 (Fall) or Sept. 11 (Spring) to allow enough time to complete the needs analysis
- 6) Recipients are notified**
 - a. Who: Scholarship Universe triggers communication to students selected
 - b. When: No later than May 1
- 7) A thank-you note request is sent to the student**
 - a. Who: Scholarship Universe triggers communication and task for student
 - b. When: Upon being selected for the award
- 8) Student completes thank-you note**
 - a. Who: Student
 - b. When: Within 14 days of being selected for the award
- 9) Unselected recipients are notified**
 - a. Who: Scholarship Universe triggers notification upon closing of the application (after awarding is completed)
 - b. When: Upon closing of the scholarship.
- 10) Awards are added to student's package**
 - a. Who: FASO
 - b. When: Within 14 days of receiving notification of awards to post in Scholarship Universe
- 11) Scholarship awards are disbursed**
 - a. Who: FASO
 - b. When: Based on disbursement rules, typically the day following census (Fall: August/September; Spring: January/February)
- 12) Close Scholarship Application**
 - a. Who: FASO or school/college designee
 - b. When: After census date
- 13) Scholarship Reconciliation & Reporting**
 - a. Who: FASO or Fund Manager

b. When: Based on requirements listed on the donor agreement