Developing Your Scholarship Management Roadmap

November 2, 2019

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Technical Support Specialist
“I only come into the system once a year…”

“What’s the next step to take? I don’t remember what this is…”

“I’m new and don’t know what to do.”
The What & The Why
Documenting Business Processes

Overview of Process

Example: Scholarship Preseason

Workshop: Scholarship Season
SIX-POINT PROCESS

- Review with team
- Record the process
- What is the Purpose of the process?
- What are the Action Steps of the process?
- How are those steps to be completed?
- Are these steps reliant upon anything?
- When is the action step to be completed?
- Who is accomplishing this?
<table>
<thead>
<tr>
<th>What - The action step that needs to take place</th>
<th>Why - The purpose of the step</th>
<th>How - The means of completing the action, any dependencies or requirements that must take place before</th>
<th>Who - The person that executes the action</th>
<th>When - The timeline this step needs to be completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Verify scholarships will be run</td>
<td></td>
<td>Confirmation of Donors and Funds Available with Awards Chair</td>
<td>Chapter Super Admin / Scholarship Manager</td>
<td>12-Jan</td>
</tr>
<tr>
<td>1 Confirm with donors they will be supporting the named scholarship</td>
<td></td>
<td>Reach out to current named scholarship donors</td>
<td>Awards Chair</td>
<td>12-Jan</td>
</tr>
<tr>
<td>1 Confirm with Treasurer that funds are available to support scholarships</td>
<td></td>
<td>Email Treasurer</td>
<td>Awards Chair</td>
<td>12-Jan</td>
</tr>
<tr>
<td>1 Set up scholarships in system</td>
<td></td>
<td>Advance scholarships in ChapterNet and coordinate with the Awards Chair</td>
<td>Chapter Super Admin / Scholarship Manager</td>
<td>1-Feb</td>
</tr>
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</table>
| 1 Review setup of scholarships                 | Want to make sure the process of applying is correct so that the correct students are eligible to apply for the correct scholarships | - Review Open/Close Dates, Standard Restrictions, Eligibility Questions, Custom Questions, and Additional References.  
- Run a Test Student through the process.  
- Reach out to Scholarship America with Questions  
- Review Enhancement document to see if any changes impact our requirements | Chapter Super Admin / Scholarship Manager | 31-Jan                                    |
| 1 Review Positives and Room For Improvement notes from previous year |                               | Compile list of scholarship season that needed improvement from the previous year | Awards Chair/Committee | 1-Dec                                     |
| 2 Create student instructions                 | To provide students with the exact requirements needed to apply for our scholarships | - Modify stock instructions Scholarship America provides in Affiliate Resources to align with Local Dollars for Scholars requirements  
**Needs:**  
- PowerPoint or Word, depending on which instructions we will modify | Scholarship Manager | 1-Feb                                     |
Example: Scholarship Preseason Process
Process Example

Process Timeframe
Start: December Board Meeting
End: February 8 (Before the Scholarship Open Date)

Scholarship Preseason
Step 1: Identify the Purpose

Scholarship Preseason Example

Prepared to accept student applications for my Dollars for Scholars scholarships by:

1. Having scholarships ready online for students to apply,
2. Having student instructions available,
3. Spreading the news
Step 2: Identify the Action Steps & Why the Step is Needed

1. Having Scholarships ready for students to apply

- Verify scholarships will be offered
- Confirm with donors their plans to support named scholarships
- Confirm with Treasurer that funds cover expense of scholarships
Step 3: How will the action step be completed?

1. Having Scholarships ready for students to apply

- Verify scholarships will be offered
- Confirm with Awards Chair
- Confirm with donors their plans to support named scholarships
- Reach out to donors & contacts of named awards
Step 4: When is the action Completed & by Who?

1. Having Scholarships ready for students to apply

Verify scholarships will be offered
- January 12
- Schlrshp Mgr

Confirm with donors their plans to support named scholarships
- January 11
- Awards Chair

Confirm with Awards Chair

Reach out to donors & contacts of named awards
### Step 5: Record the process

<table>
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<th>Process Name</th>
<th>Scholarship Preseason</th>
</tr>
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</table>
| **Timeframe**          | Start: December 1, 20XX  
                          | End: Feb 8, 20XX  
                          | Scholarships Open Feb 10 |
| **Process Purpose (output)** | Prepared to accept student applications for the Local Dollars for Scholars scholarships by:  
                          | 1. Having scholarships ready,  
                          | 2. Having student instructions available,  
                          | 3. Spreading the news |

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<td>Verify scholarships will be offered</td>
<td>Only want students completing applications for scholarships that will be provided</td>
<td>Confirm with Awards Chair Donors are set and funds are available</td>
<td>Scholarship Manager</td>
<td>12 - Jan</td>
</tr>
</tbody>
</table>
Step 6: Review the process
Workshop: Scholarship Season
Scholarship Season Workshop

- Verify Submitted Applications
- Score Applications
- Award Scholarships
Done?
Action Steps

Document
Begin documenting your process in the next 2 weeks OR Contact the primary board member to begin

Follow Up
Check in with your “buddy” in 2 week time to make sure they have begun documenting with their board
Technical Support

Technical Consultations & Questions

Support Button

dollarsforscholars@scholarshipamerica.org

877-900-8201

Chapter Support

Individualized Consultation

Community Engagement Director
Nicole Alexander: 888-472-6309

North Dakota State Director
Staci Holzheimer: 701-328-5702

statedirector@nddfs.org
“The most valuable asset this country has is not gold or oil, but the minds of young people.”

- Dr. Irving Fradkin