

Scholarship AMERICA

## Reports 5K: Sharing Your Story Using Reports

Adam Specht | Technical Support Specialist  
Scholarship America

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### Who Runs Reports?



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### Be a reports runner



- Access information your potential donors want to know
- Assist Students with the Application Process
- Have up-to-date information on your website

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## 5K Reports Warm-up

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### What are reports?



You can report on nearly any data point in the system

Each time a report is run – outcome may be different

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### Where are the reports?

Reports in My Library

Name

Showing 11 record(s).

Name	Show Reports
Scholarship Setup reports	Show Reports
Student reports	Show Reports
Applicant Reports	Show Reports
Scoring and Evaluation reports	Show Reports
Need-Based Applicant reports (NEC & SBC)	Show Reports
Recipient Lists reports	Show Reports
Historical Recipient reports	Show Reports
Users and Contacts	Show Reports
Chapter reports	Show Reports
National Staff reports	Show Reports
Community Engagement Director reports	Show Reports

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**Start – 2K:  
Reports for Donors/Fundraising**

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**What do Donors Want?**

- Basics of the organization  
your mission, approach, and make up
- Financial picture
- Legitimacy
- Breadth and Depth
- Impact



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**Chapter Reports**

**Reports in My Library**

Name

Showing 11 record(s).

Name	
Scholarship Setup reports	Show Reports
Student reports	Show Reports
Applicant Reports	Show Reports
Scoring and Evaluation reports	Show Reports
Need-Based Applicant reports (EFC & SPC)	Show Reports
Recipient Lists reports	Show Reports
Historical Recipient reports	Show Reports
<del>Users and Contacts</del>	<del>Show Reports</del>
<del>Chapter reports</del>	<del>Show Reports</del>
<del>National Chair reports</del>	<del>Show Reports</del>
Community Engagement Director reports	Show Reports

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## Chapter Reports

Name	Description	Search Type
Chapter Contacts: Active Board Members <a href="#">Contact Info</a>	Active Board Members with email and phone	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>
Chapter Contacts: Active Executive Board Member <a href="#">Contact Info</a>	Active Executive Board Members (President, Vice-President, Treasurer, Secretary) with email and phone	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>
Chapters: Affiliate Financial Snapshot - Financial Report All Years	Report provides a yearly financial picture based on the financial report. For each year it includes: Total Endowment, Total Assets, Total Income, Total Expenses (and a breakdown of the five types), Voting Board Members, Adult Volunteer count, Student Volunteer count, a Paid Staff count, and a 1099 Count.  <small>An Average for Board Members and Volunteers is provided</small>	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>
Chapters: Affiliate Student Impact - Financial Report All Years	This report provides pertinent financial report impact information from each year your affiliate filed a Financial Report in ChapterNet beginning with FY 2012. Includes the Dollars Raised, Dollars Distributed, # of Recipients and Student Support Activities.  <small>The Dollars Raised, Dollars Distributed, # of Recipients, and Student Support Activities Amounts are totaled for all years.</small>	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>
Chapters: All Website Pages Updated Dates	All website pages last updated date	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>
Chapters: Website Main Pages Updated Dates	Each website main navigation pages (Home, Donate Now, About Us, News & Events, Chapter Contact, Volunteers, and Students & Parents) along with the last updated date	Chapter reports <a href="#">Run</a> <a href="#">Add to Favorites</a>

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## Financial Picture

**Chapters: Affiliate Financial Snapshot - Financial Report All Years**

Report provides a yearly financial picture based on the financial report. For each year it includes: Total Endowment, Total Assets

[Edit Details](#) [Edit Report](#) [Share Report](#)

View data as: Raw Data

Showing 3 record(s)   **Jump To Page:**    **Limit Per Page:**

Chapter ID	Chapter Name	Affiliation Date	Fiscal Year	Total Endowment	Total Assets	Total Income	Total Expenses
Test	Test Affiliate Bootcamp Dollars for Scholars	2015	200000	214250	9850	8800	
Test	Test Affiliate Bootcamp Dollars for Scholars	2016	200000	215550	22800	21500	
Test	Test Affiliate Bootcamp Dollars for Scholars	2017	200000	217350	23550	21750	
					<b>50200</b>	<b>51850</b>	

Contact our Support team for a comprehensive history for you affiliate [SCHOLARSHIPAMERICA.ORG](#)

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## Expense Specifics

Expense: Scholarship Awards	Expense: Administrative	Expense: Irrevocable Cash Transfers	Expense: Fundraising	Expense: Student Support
7500	500	0	600	0
18000	500	0	3000	0
20500	0	0	1250	0
<b>46000</b>	<b>1000</b>	<b>0</b>	<b>4850</b>	<b>0</b>

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## Organizational Breadth

Voting Members Count	Are All Voting Members Independent?	Adult Volunteer Count	Student Volunteer Count	Paid Staff?	Paid Staff Count	1099 Issues?	1099 Count
Yes	20	41	No	No			
Yes	20	38	No	No			
Yes	20	45	No	No			
	20	41					

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## Financial Impact

% of Raised Money Distributed

Average Award

Students Served

Student Support

**Chapters: Affiliate's Student Impact - Financial Report All Years**

This report provides pertinent financial report impact information from each year your affiliate filed a Financial Report in ChapterNet beginning with FY 2012.

(Click Details) (Edit Report) (Share Report)

View data as: Filter Date:  Jump To Page:  Limit Per Page:

Chapter ID	Chapter Name	Affiliation Date	Fiscal Year	Dollars Raised	Dollars Distributed	# of Recipients	Ta. Mentoring	Ta. Mentoring Amount
Test	Test Affiliate BookCamp Dollars For Scholars		2015	9850	7500	5	Yes	
Test	Test Affiliate BookCamp Dollars For Scholars		2016	22900	18000	15	Yes	0.00
Test	Test Affiliate BookCamp Dollars For Scholars		2017	23550	20500	19	Yes	
				46300	46000	39		

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**3K – 4K:  
Reports for Assisting Students**

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**Mobilizing for Postsecondary Education**



- Raising scholarship funds
- Establishing endowments
- College readiness
- Assist with financial aid process
- Distributing scholarships

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**Student and Applicant Reports**

**Reports in My Library**

Name

Showing 11 record(s).

Name	
Scholarship-Donor reports	Show Reports
Student reports	Show Reports
Applicant Reports	Show Reports
Planning and Evaluation reports	Show Reports
Need-Based Applicant reports (EFC & SPC)	Show Reports
Recipient Lists reports	Show Reports
Historical Recipient reports	Show Reports
Users and Contacts	Show Reports
Chapter reports	Show Reports
National Staff reports	Show Reports
Community Engagement Director reports	Show Reports

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### Student Reports

Student Status - Parental Consent - Incomplete - 2019 H.S. Seniors	All 2019 h.s. seniors who still need parent consent along with parental info when available. The email function will go to the student, not the parent.	Student reports	Run	Add to Favorites
Student Status - Reference Request - Incomplete - 2019 H.S. Seniors	All 2019 h.s. seniors who still need their Primary Reference to be completed. The email function will go to the student, not the reference.	Student reports	Run	Add to Favorites
Student Status - Transcript Request - Incomplete - 2019 H.S. Seniors	All 2019 h.s. seniors who still need their School Official Transcript Request to be completed. The email function will go to the student, not the school official.	Student reports	Run	Add to Favorites
Students - All students' phone numbers - last eligible year(s)	All students with primary phone and alternate phone number.	Student reports	Run	Add to Favorites
Students - Eligibility Verified Date - 2019 H.S. Seniors	Students with email and Date Eligibility Verified. The Eligibility Verified Date is the date the student last searched for scholarships in My Scholarships Filtered to HS Graduation Year - 2019	Student reports	Run	Add to Favorites
Students - H.S. Seniors' Majors and Activities - 2019	Students with Instanced Major 1, 2, 3, 4, & 5. Activity Name: Activity Type, Office Award, or Honor. Type, and Year. Filtered to graduation year of 2019	Student reports	Run	Add to Favorites
Students - H.S. Seniors that have not searched for scholarships - 2019	List of Students with email that have not searched for scholarships by going into the My Scholarships section of their profile. Filtered to 2019 graduates.	Student reports	Run	Add to Favorites

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### Scholarship Search?

**Students: H.S. Seniors that have not searched for scholarships - 2019**

List of Students with email that have not searched for scholarships by going into the My Scholarships section of their profile. Filtered to 2019 graduates.

[Edit Details](#) | [Edit Report](#) | [Share Report](#)

View data as: Raw Data | Showing 1 record(s) | Jump To Page: 1 | Limit Per Page: 25 | [Email](#) | [Email and Track Students](#) | [Export](#) | [Export CSV](#)

Applicants ID	First Name	Last Name	Email Address	Graduation Year	Have they Searched for scholarships?	Updated Date
202322	Ava	Cado	<a href="mailto:chademet.student+2@gmail.com">chademet.student+2@gmail.com</a>	2019	No	09/26/2018

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### Applicant Reports

Name	Description	Search Type
Applicant Status - email with submitted scholarships - 2019	Applicants and Applicants with submitted scholarships. Filtered to show applicants with most recent scholarship year of 2019.	Applicant Reports
Applicant Status - email with unsubmitted scholarships - 2019	Applicants that have unsubmitted applications. Filtered to 2019 scholarships.	Applicant Reports
Applicant Status - Primary Reference Request - Incomplete	Applicants with an incomplete Primary Reference. Includes email and status. Applicants are matched to scholarships, this does not indicate they have applied for any scholarships. Filtered to 2019 applicants.	Applicant Reports
Applicant Status - Transcript Request - Incomplete	Applicants with an incomplete Transcript request. Applicants are matched to scholarships, this does not indicate they have applied for any scholarships. Filtered to 2019 applicants.	Applicant Reports
Applicant Status - Requested Info - 2019	Requested Info: Applicants' Primary Reference, Transcript, and Consent Status with applicant email. Filtered to 2019 applicants.	Applicant Reports
Applicant Status - Requested Info - 2019	Requested Info Applicants' Parent Financial Information Status, Primary Reference, Transcript, and Consent Status (incl. SPC Financial Info) Status. Only use this report if you use the SPC for financial need. Filtered to 2019 applicants.	Applicant Reports

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### Applicant Pool Yet to Apply

**Applicant Status: Applicants and email with unsubmitted scholarships - 2019**  
Applicants that have unsubmitted applications. Filtered to 2019 scholarships

[Edit Details](#) [Share Report](#)

View data as: [Raw Data](#)  
Showing 4 record(s) Jump To Page: 1 Limit Per Page: 25 [Print](#) [Email and Track Students](#) [Export](#)

App ID	Email Address	Count of Matched Scholarship	Count of Unsubmitted Applications	Count of Submitted Applications
169442	chaotemat.student-3@gmail.com	2	2	0
209009	chaotemat.student-5@gmail.com	2	2	0
250535	chaotemat.student-4@gmail.com	1	1	0
292308	chaotemat.student-1@gmail.com	4	4	0

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### Kilometer 4 Complete



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**Scholarship  
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**5K – Finish Line:  
The Impact Story**

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## Recipient reports

**Reports in My Library**

Name

Showing 11 record(s).

Name	Show Reports
Scholarship Setup reports	Show Reports
Student reports	Show Reports
Applicant Reports	Show Reports
Scoring and Evaluation reports	Show Reports
Need-Based Applicant reports (EEC & SRC)	Show Reports
Recipient Lists reports	Show Reports
Historical Recipient reports	Show Reports
Users and Contacts	Show Reports
Chapter reports	Show Reports
National Staff reports	Show Reports
Community Engagement Director reports	Show Reports

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## Recipient Permission for Marketing and Media Use

Name  Description

Showing 4 record(s).

Name	Description	Search Type	Run	Add to Favorites
Non-Recipients Rejected	List of applicant contact information with at least one submitted application that were not awarded a scholarship ID, name, phone and email address along with scholarship name and status.	Recipient Lists reports	Run	Add to Favorites
Applicant Contact Info - 2018	Filter to 2018 in Submitted Applicant Count, Awarded Scholarship Count, and Scholarship Year.	Recipient Lists reports	Run	Add to Favorites
Recipients Acknowledgment Info - 2018	Information from student acknowledgement form for all awarded students. Acknowledgment includes: Applicant Name, Scholarship Awarded, Award Amount, Scholarship Status, Applicant's College ID#, College attending and College Address.	Recipient Lists reports	Run	Add to Favorites
Recipients All Awarded with Goals and Unusual Circumstances	All those awarded in 2018 Scholarship Year including their Goals Essay, Unusual Circumstances Essay, and Email Address.	Recipient Lists reports	Run	Add to Favorites
Recipients All Awarded with permission of marketing/media use - 2018	All those awarded in 2018 Scholarship Year and includes the field "Student agrees to permissions of marketing/media use" - if they check the box that says, "I agree that Scholarship America or an affiliated program may use my photograph, name, the name of my community, the name and address of my school, in press releases, public announcements, and other fundraising or promotional materials throughout the world and in all media (including the Internet), whether now known or hereafter developed, without limitation or condition, to advance the non-profit objectives of Scholarship America and its affiliated programs."	Recipient Lists reports	Run	Add to Favorites

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## Recipient Permission for Marketing and Media Use

**Recipients: All Awarded with permission of marketing/media use - 2018**

All those awarded in 2018 Scholarship Year and includes the field "Student agrees to permissions of marketing/media use" - if they check the box that says, "I agree that Scholarship America or an affiliated program may use my photograph, name, the name of my community, the name and address of my school, in press releases, public announcements, and other fundraising or promotional materials throughout the world and in all media (including the Internet), whether now known or hereafter developed, without limitation or condition, to advance the non-profit objectives of Scholarship America and its affiliated programs."

[Edit Details](#) | [Edit Report](#) | [Share Report](#)

View data as: Raw Data

Showing 3 record(s). Jump To Page:  Limit Per Page:

[Export](#) | [Export CSV](#)

Applicants ID	First Name	Last Name	Scholarship Name	Status	Student agrees to permission of marketing/media use.
169442	Huck	LeBerry	Bacon Me Hungry Pork Producers Scholarship	Awarded	Yes
192688	Roman	Slad	You will stop at Muffin to reach your goals	Awarded	Yes
189607	Artie	Tchook	Bacon Me Hungry Pork Producers Scholarship	Disbursed	Yes

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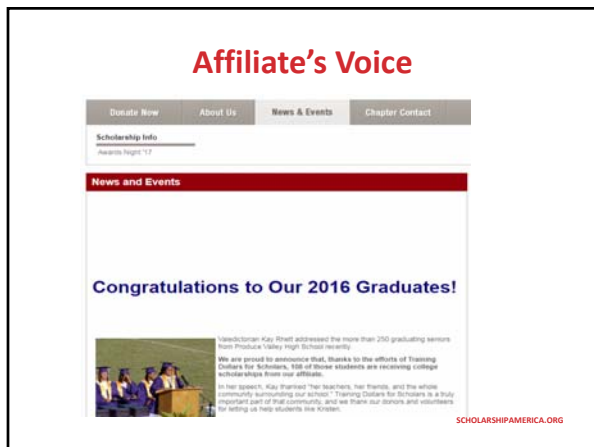
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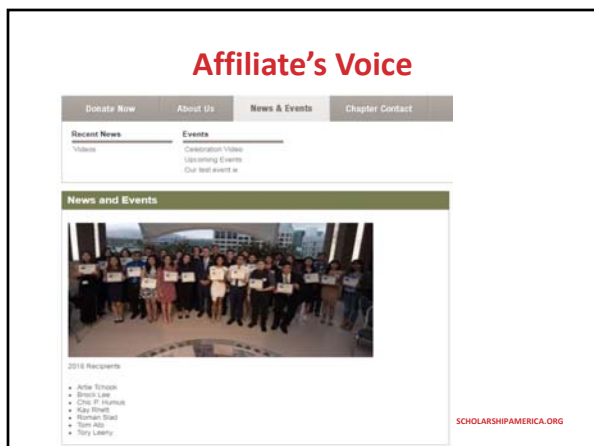
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## Affiliate's Voice

### About CSF Westfield Dollars for Scholars / Westfield, Massachusetts

CSF Westfield Dollars for Scholars is an affiliate of the national organization, Scholarship America, and its Dollars for Scholars program. The Westfield, Massachusetts chapter was established in 1962 and is a tax exempt charitable organization staffed by non-salaried volunteers.



Our mission is to expand access to undergraduate higher education for resident students of Westfield, Massachusetts, by raising funds and distributing these funds on a fair and nondiscriminatory basis.

In over five decades, through the generosity of countless citizens and organizations of Westfield and beyond, and through the efforts of our volunteers, CSF Westfield has distributed close to three million dollars to almost six thousand Westfield Students.

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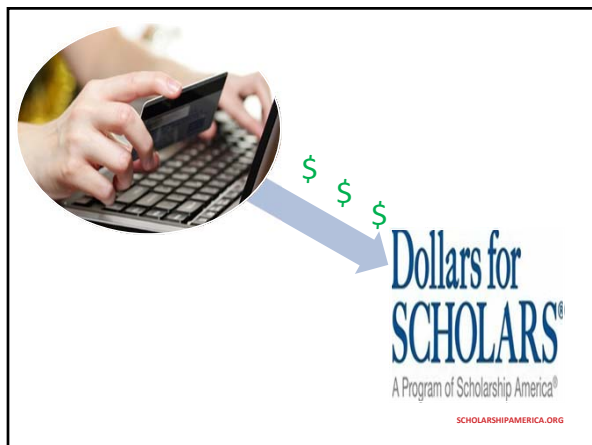
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## The End is Near



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### Website Update Check

Reports in My Library

Name

Showing 11 record(s).

Name	Search Type
Scholarship Setup reports	Show Reports
Student reports	Show Reports
Applicant Reports	Show Reports
Scoring and Evaluation reports	Show Reports
Need-Based Applicant reports (EFC & SPC)	Show Reports
Recipient Lists reports	Show Reports
Historical Recipient reports	Show Reports
Users and Contacts	Show Reports
Chapter reports	Show Reports
National Staff reports	Show Reports
Community Engagement Director reports	Show Reports

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### Website Update Check

Name  Description

Showing 6 record(s).

Name	Description	Search Type
Chapter Contacts: Active Board Members Contact Info	Active Board Members with email and phone	Chapter reports
Chapter Contacts: Active Executive Board Member Contact Info	Active Executive Board Members (President, Vice-President, Treasurer, Secretary) with email and phone	Chapter reports
Chapters: Affiliate Financial Requested - Financial Report: All Years	Report provides a yearly financial picture based on the financial report. For each year it includes: Total Endowment, Total Assets, Total Income, Total Expenses (and a breakdown of the five types), Voting Board Members, Adult Volunteer count, Student Volunteer count, a Paid Staff count, and a 1099 Count. An Average for Board Members and Volunteers is provided.	Chapter reports
Chapters: Affiliate's Student Impact - Financial Report All Years	This report provides pertinent financial report impact information from each year your affiliate filed a Financial Report in ChapterNet beginning with FY 2012. Includes the Dollars Raised, Dollars Distributed, # of Recipients and Student Support Activities. The Dollars Raised, Dollars Distributed, # of Recipients, and Student Support Activities Amounts are totaled for all years. All website pages last updated date.	Chapter reports
Chapters: All Website Pages Updated Dates	All website pages last updated date.	Chapter reports
Chapters: Website Main Pages Updated Dates	Each website main navigation pages (Home, Donate Now, About Us, News & Events, Chapter Contact, Volunteers, and Students & Parents) along with the last updated date.	Chapter reports

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**Are the main landing pages Up – To – Date?**

**Chapters: Website Main Pages Updated Dates**

Each website main navigation pages (Home, Donate Now, About Us, News & Events, Chapter Contact, Volunteers, and Students & Parents) along with the last updated date.

Edit Details | Edit Report | Share Report

View data as: Raw Data  
Showing 7 record(s) | Jump To Page: 1 | Limit Per Page: 25

Chapter ID	Chapter Name	Sib Domain	Website Basic Info Updated Date	Navigation	Updated Date	Page Name
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	Donate	01/04/2018	Donate Now
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	Chapter Contact	11/06/2017	Get in Touch
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	Volunteer Login	09/06/2018	Home
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	Students and Parents	09/19/2018	Home
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	About Us	08/29/2018	Home
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	News and Events	11/30/2017	News Home
Test	Test Affiliate Bootcamp Dollars for Scholars	testtraining	07/12/2017	Home	06/27/2018	Home

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Scholarship AMERICA

**Resources**

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**Affiliate Resources**

Marketing & Communications

Create Awareness

- Keeping Your ChapterNet Website Fresh
- 10 Tips for Greater ChapterNet Design
- Using Videos to Promote Your Affiliate
- Sample Brochures
- Sample News Releases

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### Report Coaches Support Team

**For Individualized Consultation or Support:**

Contact your Community Engagement Director

Nicole: 888-472-6309

Email: [nalexander@scholarshipamerica.org](mailto:nalexander@scholarshipamerica.org)

**For ChapterNet Technical Questions or Technical Consultation:**

Click Grey Support Button on Bottom, Left Corner of Screen

Call Customer Support: 877-900-8201

Email: [dollarsforscholars@scholarshipamerica.org](mailto:dollarsforscholars@scholarshipamerica.org)

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### Finish Line

A photograph showing a group of people at what appears to be a race finish line. In the foreground, two people are holding a large yellow sign with the text "YOU = AWESOME!" in bold black letters. The background shows other people and a building with a sign that says "MiniZone".

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