



## Developing Your Scholarship Management Roadmap

November 2, 2019



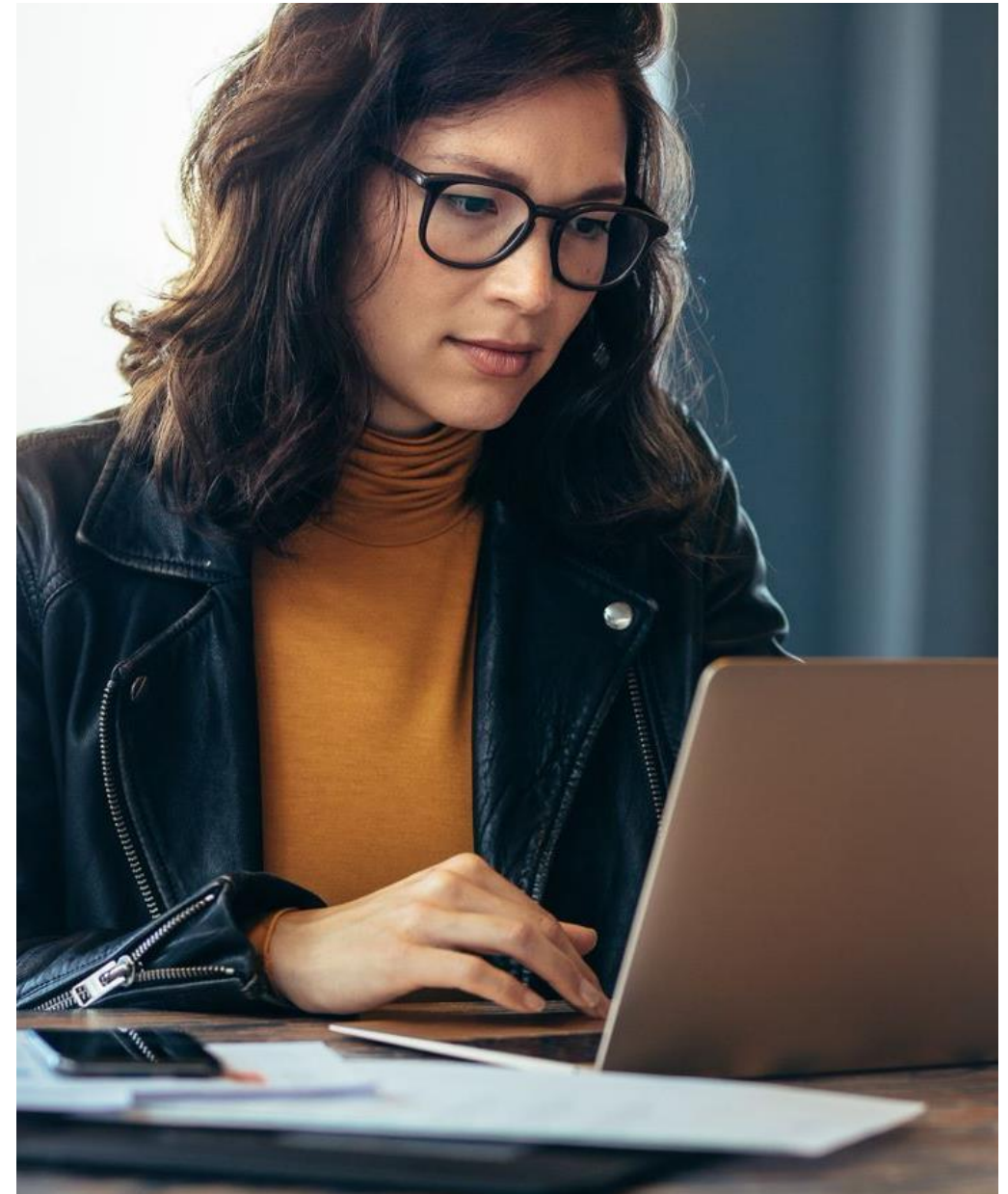
Adam Specht

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

---

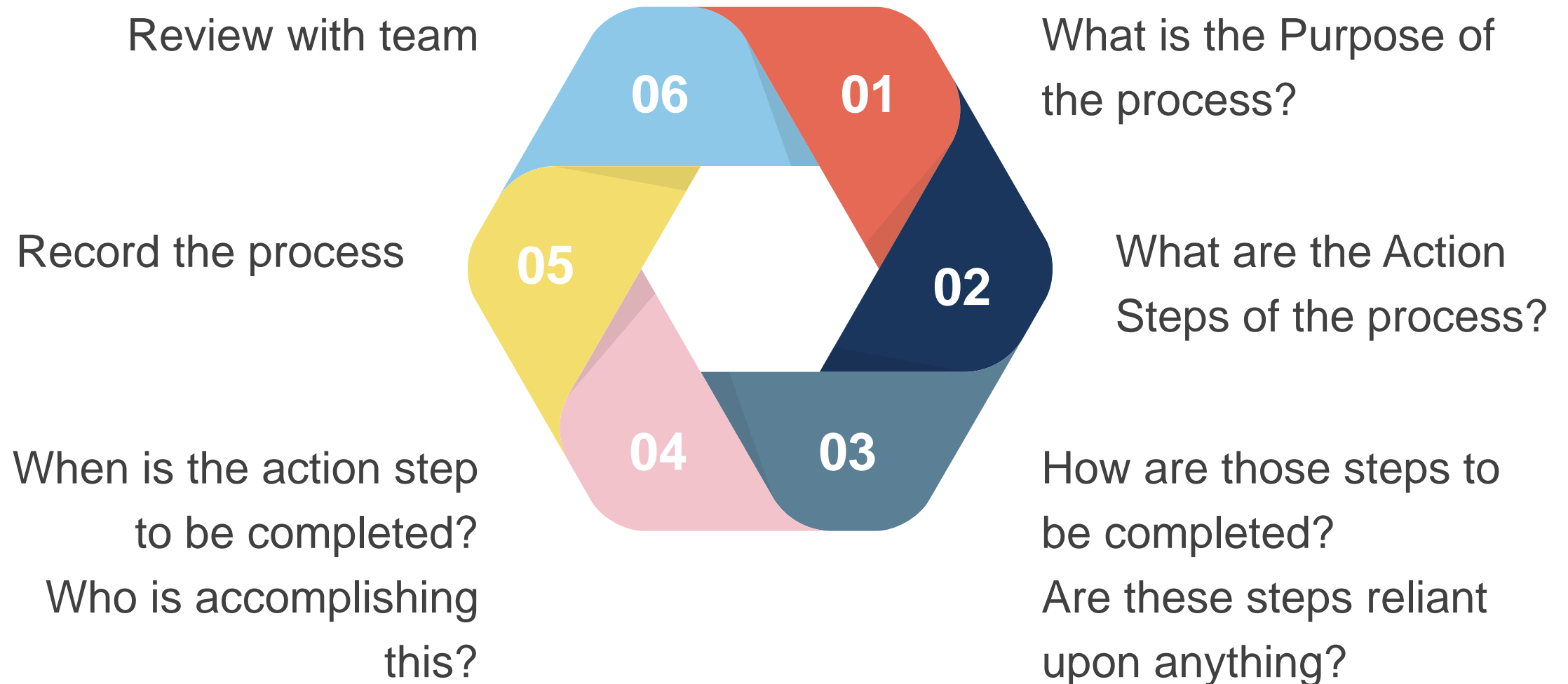
Example: Scholarship Preseason

---

Workshop: Scholarship Season

---

# SIX-POINT PROCESS



<b>Process Name</b> Assign a name to the process that properly describes what you are defining	Scholarship Preseason
<b>Timeframe</b> When does the process begin and when does it end	Start: December 1, 20XX End: Feb 8, 20XX Scholarships Open Feb 10
<b>Process Purpose</b> (output) What is the end result of the process	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

	<b>What</b> - The action step that needs to take place	<b>Why</b> - The purpose of the step	<b>How</b> - The means of completing the action, any dependencies or requirements that must take place before	<b>Who</b> - The person that executes the action	<b>When</b> - The timeline this step needs to be completed
1	Verify scholarships will be run		Confirmation of Donors and Funds Available with Awards Chair	Chapter Super Admin / Scholarship Manager	12-Jan
1	Confirm with donors they will be supporting the named scholarship		Reach out to current named scholarship donors	Awards Chair	12-Jan
1	Confirm with Treasurer that funds are available to support scholarships		Email Treasurer	Awards Chair	12-Jan
1	Set up scholarships in system		Advance scholarships in ChapterNet and coordinate with the Awards Chair	Chapter Super Admin / Scholarship Manager	1-Feb
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  <b>Needs:</b> - PowerPoint or Word, depending on which instructions we will modify	Scholarship Manager	1-Feb

# Example: Scholarship Preseason Process

# Process Example

**HELLO**

my process name is

**Scholarship Preseason**

## Process Timeframe

Start: December Board Meeting

End : February 8 (Before the Scholarship Open Date)





# 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  
Awards Chair

Confirm with  
donors their  
plans to support  
named  
scholarships

January 11

Awards Chair

Reach out to  
donors &  
contacts of  
named awards



# Step 5: Record the process

<b>Process Name</b> Assign a name to the process that properly describes what you are defining	Scholarship Preseason
<b>Timeframe</b> When does the process begin and when does it end	Start: December 1, 20XX End: Feb 8, 20XX Scholarships Open Feb 10
<b>Process Purpose</b> (output) What is the end result of the process	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

	<b>What</b> - The action step that needs to take place	<b>Why</b> - The purpose of the step	<b>How</b> - The means of completing the action, any dependencies or requirements that must take place before	<b>Who</b> - The person that executes the action	<b>When</b> - The timeline this step needs to be completed
	Verify scholarships will be offered	Only want students completing applications for scholarships that will be provided	Confirm with Awards Chair Donors are set and funds are available	Scholarship Manager	12 - Jan

## Step 6: Review the process



# Workshop: Scholarship Season

# Scholarship Season Workshop





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](mailto: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](mailto:statedirector@nddfs.org)

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

- Dr. Irving Fradkin

