**UPdate MSU Scholarship Administration 2015:**

**Aligning Resources, Practices, and Service Expectations**

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# Executive Summary

Scholarship Administration is a key element of the Montana State University System’s strategy to recruit and retain excellent students. It is also a vital component of our commitment to access. Yet, approximately 3.2 million dollars in one-time funds remain un-awarded at MSU in Bozeman. Put in context, this represents 2,100 $1,500 awards that could be disbursed and applied toward making a positive difference for our students.

Early in its investigation of why these funds go un-awarded our workgroup discovered that there is no clear picture of scholarship administration practices across the MSU system. To remedy this lack, we set out to map how scholarship administration actually functions across our four campuses. We interviewed representatives from each MSU college, the MSU Alumni Foundation, officials from all MSU campuses and representatives from ASMSU. The goal of these interviews was to understand relevant processes, communications and technology tools used to support scholarships. We also wanted to gain insight into student experiences related to scholarship application and disbursement.

**The purpose of this report is to present the results of these conversations, to map and describe scholarship administration processes, and to present recommendations for further action.**

We learned that a bewildering range of local procedures and technology tools are employed to achieve the same fundamental scholarship administration objectives, and that related practices and tools varied in unpredictable ways by campus, college, and department.  Such ad hoc proliferation of processes and technology has led in some cases to significant innovation and development of potential best practices.  However, it has also resulted in unnecessary complications for students, duplicative administrative tasks, cautious award strategies, information security concerns, and poor fund monitoring.  The creativity and commitment of our many colleagues notwithstanding, the MSU system currently lacks a comprehensive solution to the many scholarship administration needs that characterize our four-campus enterprise.

## Recommendations

The recommendations of the UPdate MSU Scholarship Administration workgroup are to

1. Pursue an RFP for the purchase and implementation of third-party scholarship administration software meeting our requirements (detailed in the following report).
2. Beginning with the Bozeman campus, simplify the scholarship application and awards process for students through the development of a common scholarship application process (and form, where possible) and the coordinated implementation of service excellence principles.
3. Consolidate and align administrative and communication practices where possible.

*I think if you look at this with a service excellence mentality the stakeholders we have to look at are the donors and the students. How is our process making this extraordinary service [available] to the students? And how does the process . . . [support] extraordinary service to the donors? ... So if you look at this from a student perspective, they are concerned about - is it easy to apply, to accept, and will it get on my financial/student account in time so I don’t get late fees? … We need to look at each touch point and see if it is extraordinary service or if it is just mediocre.*

*Kim Sinrud, Chemistry 30-Jan-2015*

# Introduction

Scholarship Administration is a key element of the Montana State University System’s strategy to recruit and retain excellent students.  It is also a vital component of our commitment to access.   Yet, approximately 3.2 million dollars in one-time funds remain un-awarded at MSU in Bozeman.  Put in context, this represents 2,100 $1,500 awards that could be awarded and applied toward making a positive difference for our students.

There are many reasons these funds are unallocated, including restrictive selection criteria, suboptimal administrative procedures, communications bottlenecks, and limited applicant pools.  While these obstacles and many others have been long known at the level of anecdote, they have not been analyzed or understood at the level of our campus systems for scholarship disbursement. Consequently, they have yet to be addressed as part of an integrated approach to student financial assistance.  Improving scholarship administration processes therefore represents a significant opportunity to improve student support while at the same time advancing our strategic objectives.

Although they are not affected to the same extent as is MSU at Bozeman by the inability to award the full range of available funds, MSU Billings, Great Falls College MSU and MSU Northern have all expressed a need to improve process efficiency, information security and donor relations on their campuses.

Fortunately, the underlying scholarship administration aspirations of all four campuses align well with the vision of the institution. In October 2014, President Cruzado announced the *UPdate MSU* initiative aimed at “improving and modernizing processes and organizational structures to better support faculty, students and staff.” One of twelve working groups, the UPdate MSU Scholarship Administration group began meeting in November 2014. The goal of this group is:

*To improve our capacity to match, track, and communicate awards by identifying appropriate scholarship management software and aligning processes in support of optimized scholarship fund usage, efficient scholarship administration and enhanced donor relations.*

During the first workgroup meetings, two themes became apparent. First, MSU’s scholarship administration processes are distributed across central administrative offices, academic units and external partner organizations, making it difficult to readily assess the state of scholarship administration at MSU in Bozeman. Second, although its core membership was both nimble and focused, the workgroup’s depth and breadth of knowledge in the area of scholarship administration across four campuses was not sufficient to achieve its goal. Optimal funds disbursement is a systemic challenge. Meeting this challenge required a systemic approach.

As a first step to mapping the scope of the work, members chose to develop a survey instrument and schedule conversations with each college at MSU in Bozeman, the Office of Financial Aid Services, representatives from ASMSU, the MSU Alumni Foundation and officials from all MSU campuses in order to understand related processes, communications between campus units and the technology tools used to support scholarships. We also wanted to learn more about student experiences in this area. We believed better understanding the interaction of scholarship administration processes, communication, and technology in the context of the relevant student experience would enable us to draft a plan to improve the system of scholarship administration and to put more available funds to work for students.

In total, the UPdate MSU Scholarship Administration workgroup held 16 meetings with constituent groups, each lasting some 1 ½ - 2 hours. Members met with each MSU college and campus separately in order to examine the relevant processes, communications and technology used in their respective areas. Participants in these conversations included scholarship administrators, review committee members (both faculty and non-faculty), IT professionals, students, campus executives, and foundation officials. The conversations were audio recorded with permission from participants. Notes of each conversation were taken and then later revised based on the audio recordings. These notes were transcribed using NVIVO and themed with special emphasis placed on comments in the area of processes, communications and technology.

**The purpose of this report is to discuss the results of these conversations, to describe and map scholarship administration processes and to present recommendations for further action.**

The UPdate MSU Scholarship Administration workgroup would like to sincerely thank the many colleagues and partners across the MSU system who devoted their time to meeting with us and providing candid and insightful perspectives. This report and any resultant actions would not be possible without your contributions. Thank you.

# Scholarship Administration Process

## Overview

Even under the best of circumstances, scholarship administration at a large campus is complex. Over 2,000 scholarships are awarded to MSU students every year, each with a set of criteria that must be matched against student qualifications through a systematic application and selection process. At Montana State University in Bozeman, scholarship administration presently consists of a loose confederation of distributed processes executed independently or quasi-independently by colleges and departments, some of which bear an unclear relationship to each other. Responsibility for various component operations and their outcomes is shared among the MSU Alumni Foundation, MSU colleges and departments and the Office of Financial Aid Services.

By way of contrast, these same component operations are more centralized across the other three MSU campuses - MSU Billings Foundation, Great Falls College MSU Office of Financial Aid, and MSU Northern Office of Financial Aid. Although there are important differences of scale and organizational logic across the four campuses, the core component operations and administrative processes are similar across the MSU system. These include advertisement, application, review and award, eligibility verification and billing. These core operations and processes might be depicted thus:



Figure 1. Montana State University Scholarship Process

Despite being similar across all four campuses, the core administrative operations and process are organized in a surprising variety of ways. Awarding scholarship monies at MSU in Bozeman, for example, can be broken down into the following 14 steps:

The Foundation establishes fund budgets based on annual receipts from donors or spending distributions from endowed accounts.

1. Once finalized, fund budgets are sent from the Foundation to the colleges and financial aid.
2. Scholarship information is advertised to faculty, staff and students.
3. After applications open, students apply for scholarships using a number of different tools.
4. Staff members in each college then compile the application data either manually or in a more automated fashion.
5. At several points in the process, a staff member from the department, college, Financial Aid or the Foundation manually verify student data to ensure that students meet the required scholarship criteria, such as GPA, major, hometown, high school, etc.
6. A college or departmental staff member then prepares materials for the review committees.
7. Verification of eligibility occurs prior to sending out award notices to students, donors and Financial Aid.
8. As a requirement of their award, students are asked to send donors a thank you letter.
9. Financial Aid verifies each student’s eligibility and then applies the fund information onto to the student record.
10. After the award is applied to each student’s bill, it is processed by Student Accounts.
11. The Foundation receives an invoice from Financial Aid in order to reimburse the University for disbursed funds.
12. At this stage, the Foundation verifies student information for a final time and pays bills from the University.
13. The Foundation continues to pay throughout the semester as bills are received from the University.

As has been noted, the other MSU campuses generally have similar scholarship administration processes. The most salient point of difference across the system involves the entity that handles the bulk of the administrative work. While colleges and departments are still responsible for review and award, the relevant administrative processes are centralized on the other three campuses; Great Falls College MSU and MSU Northern both handle the process within the offices of Financial Aid while the MSU Billings Foundation handles the process for its campus. Each of the other three campuses gains efficiency with a single scholarship application and the MSU Billings and Northern applications incorporate validated student information derived from an authoritative source -- a local SQL server database at MSU Billings and Banner at MSU Northern. Students on those campuses realize additional benefit because there is no need to manually supply the validated student information on the application, thus saving time, providing a valuable service and improving data integrity.

## Foundation Preparation

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Each year, the Foundation begins the scholarship process by verifying the funds available for the upcoming academic year. Available funds include the spending distribution from annual scholarships as well as endowments. Fund budgets are created and distributed to each college and financial aid for each scholarship.

### Scholarship Budgets

Fund budgets are sent to each MSU college and to each financial aid office in the fall of each year for use the following fiscal year. This report includes the balance available to award for each scholarship fund. This value represents the starting balance for each fund. Financial aid staff members enter the budget amount for each fund in Banner for the upcoming aid year. Staff members in each college attempt to monitor this balance throughout the scholarship cycle using a variety of tools, such as fund reports, email communications and Excel workbooks. While Excel as a tool to track budgets and awards is not problematic, when combined with late ineligibility notices, it can often reflect incorrect fund balances.

## Advertisement

Each college at MSU in Bozeman advertise scholarships through posters, webpages, flyers, class announcement, electronic bulletin boards and emails to students. Advisors are encouraged to discuss scholarship opportunities with students.

Participants from the other MSU campuses and Gallatin College noted that they use similar strategies for announcing scholarships. In addition they also take advantage of their smaller student body population and small class sizes to employ more informal means of encouragement such as speaking one-on-one with students and presenting opportunities to entire classes. For example, participants from Gallatin College noted that many students enrolled in their courses do not feel that they qualify for scholarships or would even be selected if they did. In this case, Gallatin College staff personally encourage students to apply and often complete the application with them. This strategy may not be realistic in other colleges or on other campuses due to the number of students applying for scholarships in their areas.

## Scholarship Application

The scholarship application process is different for every college interviewed, complicating the student experience for those changing majors or applying for scholarships in other colleges. For example, MSU’s School of Music frequently offers scholarships to non-Music majors in order to fill all the parts for their orchestra and other musical ensembles. Each college also has different application open and close dates, uses a different application and has different submission requirements. Some use paper applications, and some have developed an online application. For example, Great Falls College MSU utilizes an online form which is downloaded, completed with supplementary information and a physical copy returned to the Financial Aid Office where all the materials are uploaded as a PDF and posted to Microsoft SharePoint. In contrast, MSU’s College of Agriculture has developed an online form which allows students to complete their application and attach specified types of supplementary information such as transcripts which are then stored on a local server and viewable by review committee members.

The following tools are used for online applications by various entities at MSU in Bozeman:

* Survey Monkey
* Google Docs
* Adobe Forms Central
* JotForm
* Custom Online Application
	+ Developed within the college
	+ Developed by MSU Web and Digital Communications
	+ Developed by MSU employee external to the awarding college
* PDF – Electronic Submission
* PDF – Paper Submission

The following tools are used for online applications at other MSU Campuses:

* Custom online application (MSU Billings, MSU Northern)
* Paper Submission – convert to PDF (Great Falls College MSU)

All applications request basic demographic information and include questions relevant to the scholarship criteria, such as hometown, current GPA, high school, activities, major and alumni status. Many scholarship applications require supplemental information such as essays, transcripts and letters of recommendation. While the tools used above are sufficient to enable students to apply for scholarships, they can negatively impact the student experience while also contributing to institutional data security concerns. For example, a student filling out a PDF application electronically noted that in some cases they could not save their progress and in certain circumstances had to start over multiple times.

## Review and Selection

Selecting scholarship recipients takes place in review committee meetings. These committees typically rely on a master spreadsheet with scholarship and student information to assist in the scholarship process. To compile and present this data, staff members either download data from an online system into a spreadsheet or manually key the data from the applications into a spreadsheet. Each spreadsheet, created by different staff members, is used in the same way: to help match students with the scholarships they are eligible for based on the various scholarship criteria. In order to complete this task, staff members develop filters and sorting methods within the spreadsheet so that they can find appropriate students based on the criteria for each scholarship. The scholarship criteria and eligible student applicants are typically stored separately.

### Review Committee

As applicant data is compiled, review committees are formed to select student recipients. Some colleges have college level, departmental or both types of committees depending on the nature of the scholarship. The Office of Financial Aid Services at MSU in Bozeman also operates in this way, in the sense that they internally select and award scholarships for funds under their control. Typically, review committees are comprised of faculty members representing the different academic disciplines in the college or department. Each member has access to the application materials in some format. In some cases, committees use shared drives and are able to access materials online. Some members are authorized users of an online application system and can access materials through the online platform. For example, committee members at Great Falls College MSU access SharePoint to share files, with some users of this approach employing paper documents organized into binders. One college meets and decides on scholarship awardees through interactive video, and most meet face-to-face.

Review committees identify qualified students based on scholarship criteria. The scholarship administration staff member manipulates a spreadsheet with all student and scholarship information based on the criteria needed for the scholarships. Most committees attempt to award scholarships with narrow criteria first. They also try to distribute the funds equitably throughout their eligible student cohort.

## Tracking and Monitoring

Each of the main actors in the scholarship administration process at MSU in Bozeman (the Foundation, colleges/departments and Financial Aid) participate in tracking and monitoring activities. Each of these units validate student and scholarship information and verifies that students meet the appropriate criteria for a scholarship.

The online application form used at MSU Billings validates information stored in a local SQL server database. A similar process is in place at MSU Northern. In each of these cases, student information is validated programmatically and is not done by review committees or individuals supporting review committees. Later, centralized staff re-evaluate eligibility criteria at the end of each term. At Great Falls College MSU, Financial Aid staff use Banner reports to validate eligibility information.

All three of the MSU at Bozeman actors are committed to ensuring compliance with scholarship eligibility requirements and donor wishes. Each of these groups uses various methods to make certain that they do not award funding to students who do not meet the established criteria. Financial aid is also concerned with ensuring that the correct fund amount is applied to the correct student’s account. At the college/department level, staff members also monitor the status of scholarships in order to keep students informed.

There are a number of blind spots and potential bottlenecks in our administrative processes at MSU in Bozeman. Each of the main actors participates in the process largely unaware of what the other actors do. Participants regularly noted that they do not have an effective way to track the fund balances or identify whether money is encumbered or available to award. All departments spoke of issues with tracking their budgets and provided examples of promising money that seemed available on a Foundation report, but, in reality, had already been encumbered without having yet been billed to the Foundation. For its part, the Foundation is unaware of encumbered funds until a bill is received.

The inability to see encumbered funds and current available cash frequently motivates colleges and departments to award less than the full available amount. Given the incomplete information with which they are working, colleges and departments may feel they need to keep some funding in reserve in order to manage the risk of finding their cash balances overdrawn. If staff members need to know the current fund balance, they must use the monthly fund report and manually subtract monies they have awarded to students but that have not yet been billed or paid by the Foundation. The Office of Financial Aid Services did note that they monitor fund balances within Banner, and that they provide reporting upon request. However it is unclear that departments know receiving such reports is an option.

Another aspect of scholarship administration that is difficult to track is the status of the award process itself. There is no real-time way for colleges, departments, students or the Foundation to identify the status of an individual student’s scholarship. Students receive notice of the award from their college; they also receive notice from Financial Aid when the award is ready to be accepted in Banner. They receive no further information, however, until the award is applied to their account. There is also no way for staff to see if there are issues or concerns with an individual student’s scholarship or account, if there is some sort of delay in disbursement, or where any such delay might be occurring. In order to begin helping students encountering problems, staff members or the students themselves must contact Financial Aid or Student Accounts to learn more about the status of the award process.

In sum, the scholarship administration processes at MSU in Bozeman are more complex than typically found on other campuses, and offer significant opportunities for improvement.

### Validate Student Information

In order to ensure compliance with scholarship requirements, staff members validate student information against each scholarship and student records held in Banner. At MSU in Bozeman, this step occurs several times throughout the scholarship process. College staff members verify student eligibility after students apply or when the committee chooses recipients. Many participants noted that they access Banner and manually validate information. Others noted that they contact Financial Aid Services, the Office of Planning and Analysis or the Registrar’s Office for reports detailing this information. Later, Financial Aid staff members complete a manual verification of student eligibility based on Banner data once the Scholarship Administration Form (SAF) is submitted. Lastly, the MSU Alumni Foundation completes an eligibility verification of all invoiced scholarships, a process that involves manually reviewing over 2000 awardees in a spreadsheet line by line.

If at any point a student is thought to be ineligible, then Financial Aid or the Foundation contacts the college that selected the student and asks for clarification or for an alternate selection. College/department practice varies on whether they tell the first awardee that they are ineligible. In some cases where a student proves ineligible after being notified of an award, the relevant college pays the promised scholarship to the original recipient from other funding sources. College staff then identify a new recipient, either by selecting an eligible, alternate from those in the original list or by initiating a new scholarship process with their review committee. The departments find it challenging to award these funds, especially if the notification of ineligibility comes late in the semester after the student’s bill is paid. Participants mentioned it is often impossible to award funds to another student in these circumstances, due to lack of time to make such an award or to having too few eligible student applicants.

### Notification

Once recipients are chosen, administrators notify departments and students. Most departments require recipients to sign a form accepting the scholarship. Some students turn down the funding (due to other funding sources or because they wish other students to have the support). All departments require students to send a thank you letter to the donor or donor’s family.

College staff members complete a Scholarship Authorization Form (SAF) once the donor thank you letter is sent. This serves as the mechanism for colleges to notify Financial Aid of the scholarship recipients and includes information on the college, name of scholarship, recipients, and amount authorized for each student. If there is an issue with any of the scholarship funds at this point in the process, Financial Aid staff members send the form back to the college and request changes to be made. A corrected form is then re-submitted to Financial Aid.

As the SAF’s are received Financial Aid prepares a master spreadsheet/invoice with each scholarship recipient listed and sends it to the Foundation. This master list includes over 2000 lines of scholarship recipients. This step does not occur at MSU Billings as their Foundation manages the process and receives lists of successful applicants directly from review committees.

## Award and Billing

After the SAF is submitted and approved, Financial Aid adds the award to each student’s financial aid record, which is then disbursed through Student Accounts. After disbursements are made and after the 15th day of class, Financial Aid submits a bill to the Foundation. Subsequent bills are submitted throughout the aid year after Financial Aid receives payment for the previous bill. Each subsequent billing is smaller than the initial one.

The Foundation tracks fund balances, bills and payments. Once information is uploaded into the accounting system the Foundation reimburses the University. Payments continue to be sent throughout the aid year as new awards are made and student eligibility changes lead to award revisions. The Foundation continues to make payments during the year. Near the end of each year Financial Aid processes a final bill to ensure accuracy prior to the end of the fiscal year.

Financial aid receives approximately 80% of the billed amount within two weeks of submitting the initial bill to the Foundation. The remaining 20% is received once the Foundation gives the scholarship list a final review. When the Foundation submits the final amount, it is accompanied by a “Remittance” which is the complete list of the scholarships paid by the Foundation.

With the exception of one difference near the end of its billing cycle, MSU Billings’ process is similar to MSU at Bozeman. The only major difference is that MSU Billings Foundation staff send the names of scholarship recipients to Financial Aid and to the Business Office. In contrast, colleges and departments at MSU in Bozeman notify Financial Aid Services staff who then inform the MSU Alumni Foundation after the award has been disbursed. Financial Aid posts the scholarship to each student’s financial aid record. The Foundation processes a check for the amount of disbursed scholarships and sends the payment directly to the Business Office. Additional checks are sent to the Business Office during the semester to cover scholarships that are disbursed for a specific time period. A spreadsheet with information on what scholarships are included in the bill accompanies each check.

After the 15th class day the MSU Billings Foundation, Business Office, and the Financial Aid Office reconcile each fund. If a student does not attend the semester, the funds for the scholarship are returned to the Foundation. Then, depending on the type of scholarship, the Foundation either returns the funds to the donor or re-awards the scholarship to another student. When the three offices balance the scholarships, all discrepancies in the student’s accounts are resolved and the funds sent by the Foundation equal the amount posted to the student’s account.

MSU Northern has a process very similar to MSU at Bozeman. Once all the recipients are chosen and verification is complete, Financial Aid loads award information to Banner, which initiates billing. The bills are submitted to the Foundation for payment.

The billing process for Great Falls College MSU begins when the Financial Aid office adds scholarships to the student financial aid record. After the disbursement process is complete, endowed funds are billed to the MSU Alumni Foundation. Non-endowed funds are drawn from the appropriate account as disbursement occurs.

## Software Applications

Each campus and each college at MSU in Bozeman administers scholarships using different strategies and tools. Workgroup members noted four colleges on the Bozeman campus as well as two additional campuses that have developed innovative software solutions internally or by contracting with external partners to enhance their scholarship processes. In light of this innovation, we also solicited information from other universities to determine if and how they have enhanced their scholarship processes. These areas are, MSU Billings, MSU Northern, MSU College of Agriculture, MSU College of Education Health and Human Development, MSU College of Letters and Science, MSU Honors College, University of Montana, Idaho State University and the Colorado Community College System.

### Montana State University Billings

Montana State University Billings developed a single online scholarship application for all scholarships across their campus. The application was developed in partnership with the MSU Billings Foundation. Once submitted, the application information is stored in a SQL server along with validated student information such as GPA. A Microsoft Access database is available for Foundation staff members and is used for reporting purposes. For example the Access database is used to identify and monitor students who have received awards. Central MSU Billings IT staff members maintain both the online form and the Access database as changes are needed. Interview participants noted that they are not completely comfortable with the permissions associated with the Access database.

### Montana State University Northern

Montana State University Northern worked with IT staff at MSU in Bozeman to develop an online scholarship application available to continuing students within MyInfo. Students authenticate their identity to access the application using MyInfo. Once submitted the application places a specific tracking code on each applicant’s Banner financial aid record which is then used for reporting purposes. Once the application deadline is passed, members of the Financial Aid Office run queries which pull self-reported and validated student data from Banner into Excel so that it can be sorted and filtered for the selection process. The application form is activated and deactivated manually by IT staff at MSU in Bozeman upon request from the MSU Northern Financial Aid Office.

### Montana State University College of Agriculture

Three years ago, Scholarship Administrators and IT staff within the College of Agriculture partnered to redesign their scholarship process. The College of Agriculture scholarship administration software includes the following features,

* a single online application for all but one scholarship program within the college,
* student and employee authentication using a supplied email,
* the ability to match students to awards based on self-reported student information,
* role based permissions for administrators, faculty and departmental staff,
* the ability to partially track fund balances,
* retention of historical award records for tracking purposes,
* the ability to upload and store certain types of documents,
* reporting capabilities including the ability to export information to Excel,
* the ability to generate SAF’s following awards, and
* the ability to open and close the application process.

Student and scholarship data is stored on a server within the college and two staff members, a software developer and system administrator maintain the software and related hardware.

### Montana State University College of Education Health and Human Development

Many years ago, the College of EHHD worked with a graduate student to create an online scholarship application which included some backend features to store student information. After this student left the University, college officials began working with an MSU employee in the Admissions Office to redesign their scholarship software. This software includes the following features;

* two online applications (one for each department in the college),
* the ability to match students to awards based on self-reported student information, using built in queries to match students to awards,
* two interfaces, including one for the administrator and the other for students which is only comprised of the scholarship application, and
* the ability to submit the recommendations via Karate mail

There is no student login required for this system. Administrator privileges are limited to a single user. This is the same staff member who also maintains the application from year to year.

### Montana State University College of Letters and Science and Honors College

MSU’s College of Letters and Science and Honors College have contracted with MSU’s Web and Digital Communications department to create an online scholarship application which includes a database to store submitted information and the ability to upload certain types of documents. The application includes reporting capabilities so that application materials can be distributed to review committee members. Relative to the College of Letters and Science, it is worth noting that these features are only available for scholarships offered through the Dean’s Office and are not available for departmental scholarships. Unfortunately, no members of Web and Digital Communications were present during this conversation. Consequently, our workgroup was unable to determine the precise number of staff needed to support the application, whether any authentication is necessary for students to apply, or how many staff members are needed to administer the overall process from within the software.

### Other Universities

In addition to the inquiries made with MSU’s campuses and colleges, workgroup members reached out to three other Universities and University Systems to ascertain what they are doing in the area of scholarship administration. Workgroup members contacted the University of Montana, Idaho State University and the Colorado Community College System. The University of Montana and Idaho State University are both close neighbors of MSU and the Colorado Community College system, while much larger than the MSU system with more than 162,000 students, is often a good resource for best practices information. Like MSU, their system operates on a single instance of Banner and, similarly, their student and financial aid Banner modules utilize Banner’s multi-entity processing (MEP) capabilities which segregates student and financial aid information by campus. Unfortunately, the UPdate MSU Scholarship Administration workgroup only received responses from the University of Montana and Idaho State University. Below are brief summaries of the ways in which these institutions administer scholarships on their campuses.

#### University of Montana

The University of Montana is in the process of redesigning their scholarship process. They are moving forward in two ways. First they are creating a unified policy which includes guidelines for advertising, awarding and distribution of scholarships. This effort also includes defining best practices, identifying consistent application open and close dates and developing a consistent application. The University of Montana finalized contracts with a third-party software vendor specializing in scholarship administration solutions, (AcademicWorks) in order to develop a consistent application.

#### Idaho State University

In 2014, Idaho State University contracted with AcademicWorks[[1]](#footnote-1). Prior to implementing this solution, officials from ISU noted that they administered scholarships through a paper-based process that included multiple application forms and funds managed in a decentralized fashion. As with MSU at Bozeman, some applications were posted on a college or department website only to be physically printed and submitted on paper.

A representative of ISU mentioned that the primary motivations for pursuing a software solution included student service, process redesign and consistency. In terms of student service, they hoped to make the application process easier for students, which included having a consistent application, and making the application process available from anywhere at any time, enabling review committee members and scholarship administrators to retrieve and review documents and participate in the review and selection process remotely if needed. Since implementing in 2014, ISU has seen their scholarship applications quadruple.

# Challenges

Given the above overview of practices across our four campuses and at the two external institutions considered, it is clear there are areas of convergence and divergence with respect to the Scholarship Administration challenges faced by colleges, departments and campuses. The key challenges that emerged over the course of our review are listed below.

## Manual Processes

A number of actions that must be performed before and following a scholarship award are completed manually.

* Prepare Committee Materials – Colleges and departments which offer a paper-based or survey-based scholarship application must transcribe each application into a master spreadsheet one-by-one.
* Match Students to Awards – This was a nearly universal challenge noted throughout the interviews. Typically, a scholarship administrator within a college or department will either prepare lists of applicants for each fund - often within the master spreadsheet, or they will sort and filter the master list of all applicants. In each case, the scholarship criteria exist separately from the master spreadsheet. Consequently the criteria must be included manually in the process via the sort and filter features of Excel. Three colleges (Agriculture[[2]](#footnote-2), Letters and Science[[3]](#footnote-3), and Honors) and two campuses (MSU Billings[[4]](#footnote-4) and MSU Northern) have created an online application which either stores submitted application materials on a local server (Agriculture, MSU Billings) or in an Excel workbook (Letters and Science, Honors). These areas use sorting and filtering either in Excel or via a web-based user interface.
* Validate Student Eligibility – This challenge is one which is unique to MSU at Bozeman where all scholarship applications ask for self-reported information such as GPA, need or high school. As a result, colleges and departments, the Office of Financial Aid Services and the MSU Alumni Foundation all validate this information in order to ensure that the University does not award funds to ineligible students. In the case of Financial Aid Services and the MSU Alumni Foundation, each organization duplicates effort, validating the eligibility criteria of all 2000+ students each term. College and departmental participants noted that they either validate the information for all applicants prior to the review committee selection or only for the successful applicants. The latter strategy is most often employed.

Colleges and departments validate self-reported information in two primary ways. An individual in each area may verify information by reviewing each student record in Banner or they may request information from the Registrar’s Office, the Office of Financial Aid Services or the Office of Institutional Research. This verification challenge does not exist on the other MSU campuses because the process is centralized, preventing any need to validate data via multiple channels. In the case of MSU Billings and MSU Northern, the online scholarship application is integrated with an authoritative source such a local student data warehouse in the case of MSU Billings and Banner in the case of MSU Northern.

## Timing

* Scholarship Application Dates – Although this is a problem cited only occasionally at MSU in Bozeman, given the potential number of students affected, it is worth noting that each college on that campus has distinct application start and end dates (and sometimes start and end dates vary within an individual college). Some start in the fourth quarter of each year and others after January 1. The Honors College noted that these variable application dates pose a potential recruitment problem. For example, a student applies to the Presidential Scholarship Program and is not chosen for either a presidential scholarship or a provost scholarship. The application deadlines between colleges are such that the unsuccessful student may receive a regret letter from the Presidential Scholarship Program only to receive an award letter[[5]](#footnote-5) from a college or department at a later date. In some cases, this delay may result in the student accepting an offer from another University, thus causing MSU to lose a high quality student.[[6]](#footnote-6)
* Assessing need – Many scholarships may only be awarded to students with demonstrated need calculated based on the expected family contribution (EFC) from the student’s FAFSA. A number of review committees select successful applicants before the March 1st priority FAFSA filing deadline. In these circumstances, colleges and departments often rely on the prior year’s EFC to assess need. While this allows committees to award prior to March 1, they still run the risk that the student will be deemed ineligible after the EFC is calculated for the upcoming academic year. Assessing need can also be problematic for students who may qualify for a need-based scholarship but who have not filed a FAFSA.
* Student Ineligibility Notices – After students receive their awards, Office of Financial Aid Services and Foundation representatives monitor student eligibility for each fund. Participants noted that they may not receive timely communication about loss of eligibility. Delays may occur in Financial Aid Services and the Foundation because they are responsible for verifying eligibility for every student awarded a scholarship. This process is largely manual and time-consuming. Interview participants regularly mentioned that they either try to re-award scholarships quickly or in some cases do not re-award at all because the notice came too late in the semester.

## Staff Capacity and Expertise

Participants mentioned that staff capacity to perform as a scholarship administrator for their college or department are uneven and that scholarship processes are often reliant on the expertise of a single individual. Remarks in this area take two key forms.

* Staff Turnover – Staff turnover may result in inconsistent scholarship administration processes in a given business unit. This can create variability and unpredictability in the processes, thus negatively impacting both the student experience and the ability of review committees to make award decisions that are timely, responsive, and accurate.
* Loss of Institutional Knowledge – Participants in many areas noted that key people cannot/must not leave their positions because their level of institutional knowledge in scholarship administration is too great. Over the course of the interviews, workgroup members noted three areas in which key members left resulting in 1) loss of productivity, 2) departmental paralysis because no other member knows how internal processes are organized and function, or 3) personal process redesign whereby a new employee is tasked and then redesigns the process to suit their needs or work styles.

Reviewing these staffing issues the workgroup discussed the possibility that shared services might help to deal with staff turnover and loss of institutional knowledge. Likewise the establishment of scholarship administration best practices and a related community of practice might also help mitigate the impact of such turnover.

## Scholarship Criteria

Scholarship criteria can have an impact on a college, department or campuses ability to award certain scholarships. Challenges in this area can be either quantitative or qualitative.

* Quantitative – All interview participants noted that restrictive criteria made some scholarships impossible or nearly impossible to award from year to year. Participants frequently remarked scholarships which require an individual graduate from a certain Montana high school who is enrolled in a specific college or program were most difficult to award. This highly restrictive selection process is made even more challenging when the required program no longer exists, as was noted by participants from MSU Northern and the MSU Alumni Foundation.
* Qualitative – In a few circumstances, participants noted that it was difficult to assess certain subjective criteria such as good moral character.

## Tracking and Monitoring

Nearly all interview participants indicated that tracking and monitoring fund balances, accepted/declined awards and continued scholarship eligibility was challenging. At MSU in Bozeman, this is in part due to the distributed nature of scholarship administration. Difficulties in this area are not as consistently widespread among other campuses. At MSU Billings, this tracking and monitoring process is shared among the Foundation, Financial Aid and Student Accounts. These three entities hold conference calls regularly to review fund balances and address any discrepancies. A similar working arrangement exists at MSU Northern where participants noted that the Financial Aid Office and the Alumni Foundation have a close relationship and can readily call, email or walk over to one office or the other to resolve discrepancies. Great Falls College MSU administers scholarships within Financial Aid. All reporting is queried against Banner and discrepancies are resolved manually[[7]](#footnote-7).

* Fund Balances – Each year’s scholarship cycle at MSU in Bozeman starts with the fund budgets that are distributed to Colleges and Financial Aid by the MSU Alumni Foundation. While this figure represents the amount available for that fund for the next aid year, it can be increased or reduced based on the end of year balance for the current aid year. A number of participants noted that they do not have reliable fund balance figures throughout the year (as fund balances reflect cash without adjustments for encumbrances which are unknown to the Foundation until billed) and tend to hold back funds in order to prevent overspending. While this strategy ensures that colleges have sufficient funds in the next scholarship cycle, it increases the un-awarded balance that persist from year to year.
* Accepted/Declined Awards – Students must accept or decline their scholarships prior to the award being applied to the student’s bill. This is accomplished through MyInfo. Delays can occur when students do not accept or decline their awards in a timely fashion, or when students fail to notify the school when they choose to attend another university, change majors or withdraw from MSU. When a student declines an award there can also be a delay between the point at which the student makes their decision and when the Office of Financial Aid Services notifies the department of the change. Because of these gaps in timing and communication, colleges and departments have difficulty determining their remaining fund balances.
* Scholarship Eligibility – The Office of Financial Aid Services monitors student eligibility for each student awarded a scholarship each term. This process is largely manual since scholarship fund criteria do not exist in Banner and the student must continue to meet the criteria throughout the year. The manual nature of scholarship eligibility determination contributes to MSU at Bozeman’s difficulty notifying colleges and departments of eligibility changes, making it difficult to re-award.

## Scholarship Applications

Scholarship applications exist in a variety of different locations. They are created using a variety of different technology tools and sometimes have different features from application to application. Additionally, there are sometimes FERPA related concerns regarding the tools and data storage methods once applications have been submitted[[8]](#footnote-8).

* Different Locations – Across the MSU system, each campus, college and in some cases department has its own unique scholarship application. There are varying degrees to which the applications are available online. In some cases, a college may have a single application for the entire college. In others, there may be two applications in use. And in still other cases there may be a college level application along with departmental level applications within that college. These applications are available in a variety of different locations such as the campus, college and departmental website, the Admissions Office or Office of Financial Aid Services website. From a student perspective, these many options can seem chaotic and difficult to navigate. In some cases it can be challenging for students to determine where to apply. One interview participant within the College of Arts and Architecture noted that they’ve seen students confuse the “Apply Now” button for admissions on the MSU at Bozeman homepage with a campus level scholarship application. In this way, the student simply completed two admissions applications rather than completing the scholarship application for their college. This is not an issue at any other MSU campus, though it could become an issue at Great Falls College MSU where they recently implemented a new institutional scholarship fund. That campus is enabling each department to award its share of the funds through its own departmental process, which includes various application forms and supplementary requirements.
* Technology Tools – As noted in the previous section, there are approximately nine different technology tools used to offer scholarship applications to students. These range from fillable PDFs, paper applications, homegrown software applications, contracted web-based forms, Google Docs, Survey Monkey, Adobe Forms Central, and JotForm. In some cases, the technology tools can cause inconvenience to students. For instance, one student interviewed mentioned that they’ve applied for scholarships on a fillable pdf in which they were not able to save their progress. This student stated that they had to restart their computer and since the pdf did not allow them to save, they were forced to restart the entire application from the beginning.
* Compliance Concerns – A number of colleges and departments noted that they use commercial form building or survey providers to administer their scholarship applications. While students may freely self-report personal, directory and academic information about themselves, the storage and use of that data become the University’s responsibility once the application is submitted. Some commercial vendors explicitly state that they are not FERPA certified (JotForm, Adobe Forms Central). Other vendors note that institutions can pursue separate licensing arrangements in which the vendor will be certified (Survey Monkey, Google Docs). Given the distributed nature of the licensing, it is unclear if any college or department has pursued these separate licensing arrangements. Using non-enterprise commercial vendors in this way may pose some level of risk in this area, however, an assessment of such risk is beyond the scope of this report.

## Donor Relations

Difficulties awarding funds outside of the regular scholarship cycle may impact donor relations. At times, donors provide additional funds in the middle of the scholarship cycle. Frequently, they request that the award be given to a student during the current aid year. Delays or an inability to award can cause discontent with donors who want to see the money given to deserving students.

* New Mid-Year Awards – Increasingly, donors creating a new scholarship mid-year want the scholarship awarded during the current aid year. In some circumstances, the Foundation and/or college is not able to conduct the notification, advertising, or awarding quickly. As a result, no award is made and the donors may be unhappy.
* Existing Awards – Delays to awards can happen in a number of ways. For example, an awarded student may not be eligible for an award or an eligible student one term may lose eligibility in a subsequent term. When this occurs, delays related to communicating the change back to the college or department can prevent a student from receiving the funds. When this occurs, donors may become dissatisfied and in some cases, they may be unwilling to provide greater levels of philanthropic support in the future.

# Recommendations

## Overview

The recommendations of the UPdate MSU Scholarship Administration workgroup are to

1. Pursue an RFP for the purchase and implementation of 3rd party scholarship administration software meeting our requirements (detailed in the following report).
2. Consolidate and align administrative and communication practices where possible.
3. Simplify the scholarship application and awards process for students through the development of a common scholarship application process (and form, where possible) and the coordinated implementation of service excellence principles.

## Recommendation 1: Pursue an RFP for the purchase and implementation of 3rd party scholarship administration software meeting our requirements

The table below details information received from each of the departments and MSU campuses on numbers of managed scholarships, applications and scholarship awards.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **College/Campus** | **Enrolled Students** | **Estimated Number of Scholarships** | **Estimated Number of Applications** | **Estimated Scholarships Awarded** | **Estimated Awards Annually (thousands)** |
| **Agriculture** | 1003 | 119 | 305 | 295 | 390,000 |
| **Arts and Architecture\*** |  |  |  |  |  |
| **Business** | 1200 | 65 | 250 | 140 | 255,000 |
| **EHHD** | 1916 | 58 | 200 | 128 |  101,000 |
| **Engineering** | 3310 | 222 | 1125 | 439 | 651,000 |
| **Gallatin College** | 300 | 1 | 18 | 3 | 2,000 |
| **Graduate School** | 1985 | 5 |  | 37 | 95,000 |
| **Honors** | 1200 | 1 | 500 | 30 | 69,000 |
| **Letters & Sciences\*\*** | 3500 | 7 | 150 | 8-10 | 11,000 |
| **Nursing\*** | 1000 | 35 |  |  |  |
| **MSUB** | 4315 | 1050 | 750-800 | 600 | 810,000 |
| **MSUN** | 1172 | 1172 | 460 | 275 | 231,000 |
| **GFCMSU** | 2579 | 15-20 | 50-80 | 15-120 | 60,000 |

\*Limited or no information available.

\*\*Response represents scholarships offered at the Dean’s Office only.

The objective of the UPdate MSU Scholarship Administration Working Group is to improve our capacity to match, track, and communicate awards by identifying appropriate scholarship administration software and aligning processes in support of optimized fund usage, efficient scholarship administration and enhanced donor relations*.* After speaking with officials from across the MSU enterprise, workgroup members have seen the multitude of ways in which colleges and campuses perform the same actions fundamental to scholarship administration*.* This dizzying array of forms, processes, and people supporting scholarships represents an opportunity to better leverage technology in order to unify procedures and better serve students.

Throughout the course of this project, workgroup members have seen the software applications developed by a number of our colleges and campuses. The most sophisticated of these, is the application developed within MSU’s College of Agriculture. The College’s student success, finance and IT staff have created a powerful tool which reflect many of the features covered below. Adopting the College of Agriculture solution is attractive relative to being able to customize the software to precisely meet our scholarship management needs. However, this approach would require additional and significant IT support in order to scale and maintain the solution across the entire enterprise. Thus after careful review and discussion, the workgroup feels that the most appropriate course of action for strategic, organizational, and financial reasons is to invest in a vendor supplied solution.

There are a number of software vendors providing enterprise level scholarship administration tools. We are confident MSU can leverage this existing technology to fulfill our needs. While the University of Montana and Idaho State University have redesigned their scholarship processes with a vendor called AcademicWorks, there are a number of other commercial providers who operate in this space. Some specialize in higher education, such as AcademicWorks, AwardSpring and Community Force. Others offer solutions that are not as industry or product specific, such as WizeHive, FluidReview and NextGen Web Solutions. AcademicWorks may cost approximately $34,000 annually. Similarly, CommunityForce offers its software for $125 per month for each administrative user. Unfortunately, most vendors do not publish pricing online and pricing models likely differ between vendors. Based on the two figures, however, it appears such a solution to our scholarship administration challenges could be a fiscally wise choice for MSU.

Given the motivations for UPdate MSU, resource constraints and the number of commercial providers operating in this space, **the workgroup feels that pursuing a commercial solution is an appropriate strategy.** We recognize MSU must find a solution that improves the student experience, enhances and simplifies administrative functions, supports efficient funds management, is scalable to all four campuses while meeting local needs, supports the entire scholarship lifecycle, and is well supported, secure, accessible, compliant and capable of integrating with Banner.

## Software recommended features:

Based on feedback from MSU campuses and colleges, the software solution should include the following features.

|  |  |
| --- | --- |
| Feature | Description |
| Online application for students | Easily accessible, single application. |
| Match students to scholarships | Match students to scholarships based on validated student information and whenever possible objective scholarship criteria.  |
| Auto awards  | System automatically matches and awards specific scholarships to students based on pre-determined criteria (for example, all students with GPA over 3.8 automatically are awarded certain dollar amount). |
| Student Information System Integration | Software is integrated with Banner and uses the student attributes stored there to simplify the scholarship application and validate/monitor student eligibility initially and on an ongoing basis.  |
| Central, secure location for housing documents, accessible by students and reviewers | Central, secure storage for applications and supplementary materials (such as transcripts, and in some cases audition materials). Requires ability to upload various types of documents (i.e. PDF, Word, and audio). May be accessible for online collaboration and comments by review committee.  |
| Letters of recommendation (upload or complete online) | Ability to upload letters of recommendation and associate them an applicant’s file. |
| Recommended Awards based on student profile | Software automatically recommends awards based on review of available scholarships and required criteria.  |
| Workflow and approvals in system | Workflow and approvals built into system for each step of scholarship process. |
| Up-to-date fund balances and fund tracking | Ability to monitor fund balances before, during and after the scholarship selection process. |
| Reporting | Ability to query and filter, applicant, award and funding information. |
|  Contact students through email  | Integrated with email systems to send emails to students using preferred email address. |
| Assist with renewals | Ability to award renewable scholarships |

## Recommendation 2: Consolidate and align administrative and communication practices where possible

Throughout the scholarship process there are duplicative, time consuming, error prone and manual procedures, which include multiple application forms, duplicative validation tasks, and uncertainties in tracking fund balances and awards in a responsive fashion. Many of these difficulties also contribute to communications bottlenecks which negatively impact new scholarship notices, award letters to students and disbursement and billing communications to on and off-campus departments.

Using the scholarship administration software defined above as a key building block, **the UPdate MSU Scholarship Administration workgroup recommends that MSU consolidate and align administrative and communication practices.** This may include leveraging the scholarship administration software to

1. standardize operating procedures,
2. provide a central location for advertising new scholarship opportunities,
3. leverage reporting or other capabilities to better distribute necessary financial, and award information and
4. create scholarship administration communities of practice to improve collaboration and ensure that departments are not exposed to undue risk due to turnover in key administrative positions.

## Recommendation 3: Simplify the scholarship application and awards process for students through the development of a common scholarship application process (and form, where possible) and the coordinated implementation of service excellence principles

There are at least nine different technology tools used to produce scholarship applications, many of which ask for very similar sets of information such as student ID, last name, first name, address, GPA, high school and others. Moreover, these are frequently created using non-FERPA compliant third-party subscription based software services such as SurveyMonkey or Jotform, thus exposing MSU at Bozeman to unnecessary risk. Given these items, the UPdate MSU Scholarship Administration workgroup **recommends simplifying the scholarship application and awarding process by using a single common scholarship application.** This may be considered a best practice and is already in use at MSU Billings and MSU Northern. Benefits of this process include standardizing the application procedures for students and leveraging Banner to validate student information already in our possession, thus simplifying the application for students and eliminating the practice of using 3rd party subscription services to provision scholarship applications. This recommendation recognizes that there will be a need for campus specific scholarship applications as well as the need to accommodate non-standard application questions and requirements such as supplementary essays. Third-party scholarship administration software should be able to accommodate these requirements.

The UPdate MSU Scholarship Administration workgroup also recommends that this overall recommendation be accomplished in alignment with the principles of service excellence. Incorporating these principles into this effort will provide a foundational set of values with which to make effective decisions. For example, investing in a software solution which is FERPA compliant and supports a single common application reinforces MSU’s safety principle to protect private and institutional data. This same example also reinforces the values of responsiveness and excellences inherent in the principles of courtesy, reliability and competence.

## Additional Recommendations

During interviews with the various participants in the scholarship administration process, a number of recommendations were voiced that may not be software related but which are worth consideration. These include:

1. Better coordinating college scholarship awards with MSU’s Presidential Scholars Program resulting in a single award letter.
2. Discussing more flexible scholarship criteria with donors (or possibly identifying criteria that could be removed if no students meet all criteria)
3. Increasing communication between Foundation development officer and colleges
4. Adding a button on MSU at Bozeman’s homepage for Scholarship applications/information
5. Adding an “apply for scholarships now” button alongside the “apply now” button to improve the visibility of the scholarship application process.

## A Note on Implementation

While recommendation one suggests a clear path to implementation, recommendations two and three will require additional clarification before they can be enacted.  We recognize that a software solution encourages a common approach to administrative and communications practices as well as expediting the scholarship application and awarding process. However, we also anticipate that software alone may not be sufficient to meet all the objectives of the updating group.

In order to maximize benefit from recommendations 2 and 3 we propose the formation of a seven member scholarship administration community of practice led by a Community of Practice (CoP) Director and associated with a broader stakeholder group with open enrollment.  Working together, the CoP Director and community of practice members will be responsible for identifying best practices, proposing and drafting relevant policies to be considered for adoption, and assessing key outcomes including administrator and student satisfaction related to scholarship processes and support.They will also be responsible for engaging the stakeholder group to solicit feedback in the areas under their charge.

# Conclusion

The *UPdate MSU* Initiative at Montana State University aims to advance processes and structures to better support students, faculty and staff. The UPdate MSU Scholarship Administration Workgroup believes that improvements to scholarship administration represent an opportunity to increase student financial assistance, provide enhanced student service, improve communications, and reduce manual and duplicative processing. Software solutions can help provide a reliable way for staff to effectively administer scholarships. Instead of using manual processes which take valuable time and resources, departmental staff will be better able to assist students. Financial aid and Foundation staff will be more effective at disbursing awards, tracking fund balances and maintaining compliance with federal, state and other regulations. By leveraging technology, the workgroup feels that the scholarship administration process will be enhanced for everyone involved.

# Appendix A – Process Maps



Figure 1. Montana State University Scholarship Process



Figure 2. MSU Billings Scholarship Process



Figure 3. Great Falls College MSU Scholarship Process



Figure 4. MSU Northern Scholarship Process

# Appendix B – UPdate MSU Scholarship Administration Members

## UPdate MSU Scholarship Administration Group

|  |  |
| --- | --- |
| Chris Kearns, lead | VP, Student Success |
| Charles Boyer | VP, Agriculture |
| Jerry Stephens | Dept. Head, Civil Engineering |
| Glenn Duff | Professor, Animal and Range |
| Ada Guisti | Professor, Modern Languages |
| Eric Wold | Systems Specialist, Student Success |
| Billy Dove | Student, Political Science Major |
| David LeVea | CFO, MSU Alumni Foundation |

## UPdate MSU Scholarship Administration Consulting Group

|  |  |
| --- | --- |
| Adam Edelman | Assoc. CIO, IT Center |
| Lindsey Downs | Project Manager, IT Center |
| Michael Barber | CIO, MSU Billings |
| Emily Williamson | Financial Aid Director, MSU Billings |
| Susan Rhodes | Scholarship Administrator, MSU Billings Foundation |
| Ken Wardinsky | CIO, Great Falls College MSU |
| Leah Habel | Financial Aid Director, Great Falls College MSU |
| Sandy Johnsrud | Financial Aid Specialist, MSU Northern |
| James Bennett | Director, MSU Northern Foundation |
|  |  |

1. In addition to AcademicWorks, there are a number of other commercial vendors who provide scholarship administration software. Vendors include: AwardSpring, CommunityForce, WizeHive, FluidReview and NextGen Web Solutions. [↑](#footnote-ref-1)
2. The College of Agriculture developed a custom application which can be used by students to apply for scholarships, administrators to compile and monitor awards and financial information and review committees to select applicants. [↑](#footnote-ref-2)
3. The College of Letters and Science has contracted with Web and Digital Communications to create an online scholarship application. The online application is used only for college level scholarships and not for departmental level scholarships which each have their own applications. [↑](#footnote-ref-3)
4. MSU Billings uses a variety of tools to administer scholarships. The online scholarship application is used campus wide, allows student to apply and validates student information against a local data warehouse. [↑](#footnote-ref-4)
5. This scenario requires the student to fill out separate applications for the Presidential Scholarship program, College level scholarships, in some cases departmental level scholarships. [↑](#footnote-ref-5)
6. It is also worth noting that most MSU colleges use scholarships for retention purposes. This is either because the scholarship requires the applicant be an upperclassman, the college or program has formal admissions requirements or because the college wants to reward students who persist in their programs, rather than award scholarships to new students who are likely to change majors. [↑](#footnote-ref-6)
7. Great Falls College MSU does not have its own Alumni Foundation. Annual scholarships are administered by the Office of Financial Aid and endowed scholarships are held by the MSU Alumni Foundation in Bozeman. [↑](#footnote-ref-7)
8. While not directly applicable to scholarship applications, participants at MSU Billings expressed concerns regarding their permissions to use Microsoft Access to connect to their MySQL database. They noted that they would prefer to explore a commercial solution with more robust permissions as an alternative. [↑](#footnote-ref-8)