


**CENTRALIZING THE SCHOLARSHIP
ADMINISTRATION PROCESS** *#Altraining*




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IMPRESSIONS**

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**THE IMPACT OF UNC CHARLOTTE'S
SCHOLARSHIP CENTRALIZATION**

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IMPRESSIONS** 2



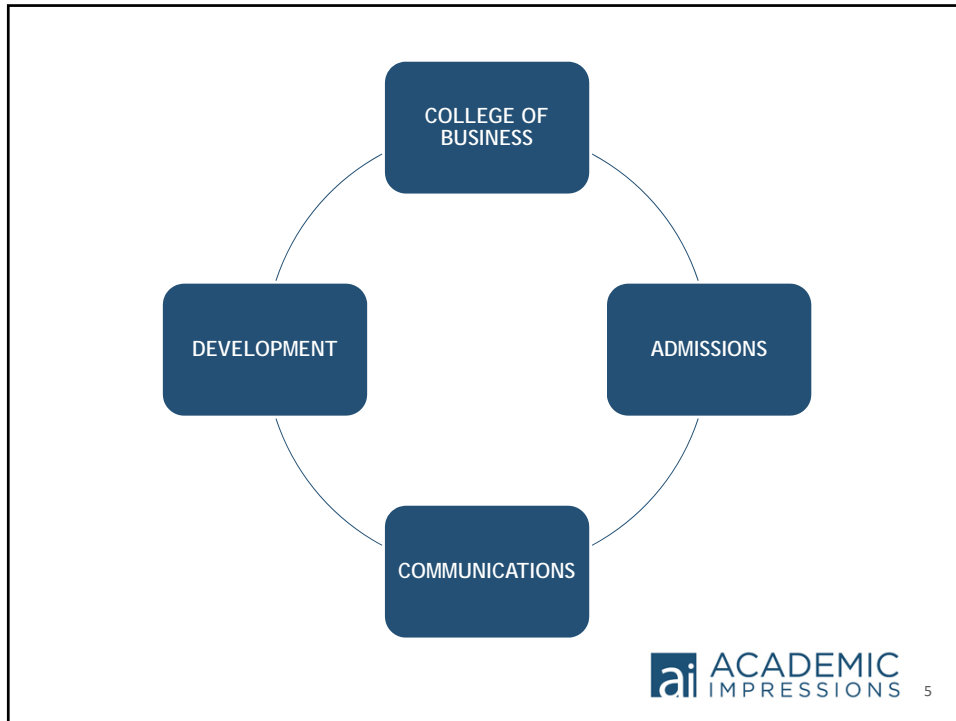
The story of the Business Merit Scholars Program began with a discovery of an endowed scholarship fund - a fund with a balance of \$100,000 that had not awarded monies in more than 8 years.

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Today the program has:

- 7-10 full scholarships
- Cohort of ~26 students





UNC CHARLOTTE

NinerScholars Portal

The NinerScholars Portal gives students access to more than 1,000 scholarships awarded by UNC Charlotte with one application, through one online system.

The Portal pulls information directly from the University's student information system to build a scholarship profile specific to your academic history and current student status. Based on your profile, you're matched with scholarships you're eligible for, and provided step-by-step instructions to apply in real-time.

Login today and start applying for multiple scholarships with a single application!

Apply for Scholarships Here

What type of student are you?

Undergraduate

- Incoming freshman
- Incoming transfer student
- Current undergraduate student

Graduate

- New Graduate School applicants
- Current graduate students

GOOD FOR STUDENTS

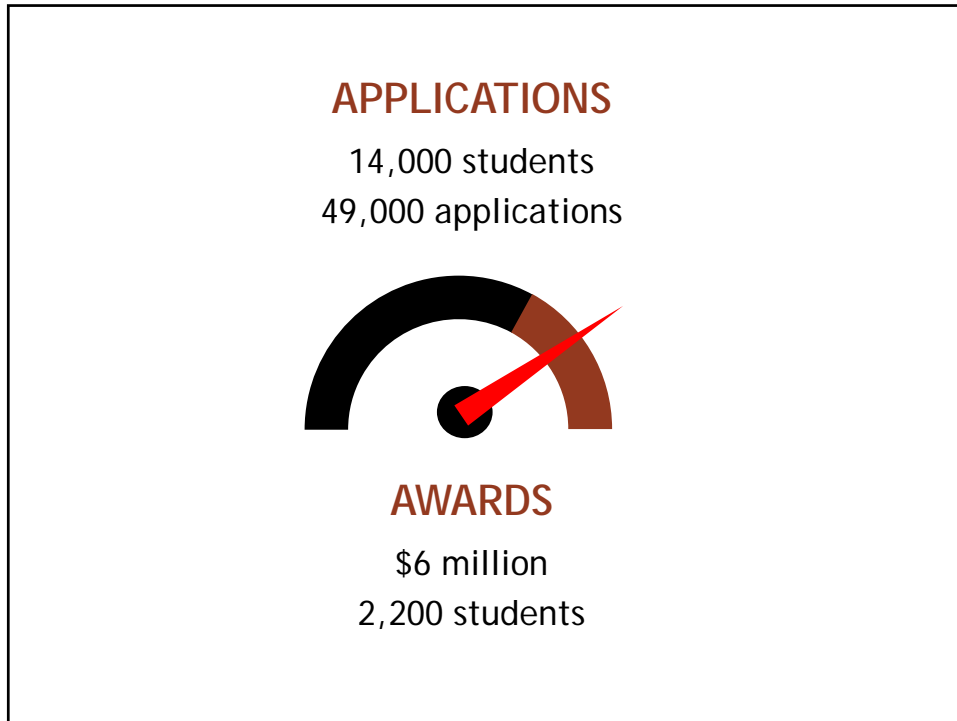


The screenshot shows the NinerScholars Portal interface. At the top left is the UNC Charlotte logo. The main heading is "NinerScholars Portal". Below it, a paragraph states: "The NinerScholars Portal gives students access to more than 1,000 scholarships awarded by UNC Charlotte with one application, through one online system." A second paragraph explains: "The Portal pulls information directly from the University's student information system to build a scholarship profile specific to your academic history and current student status. Based on your profile, you're matched with scholarships you're eligible for, and provided step-by-step instructions to apply in real-time." A third paragraph says: "Login today and start applying for multiple scholarships with a single application!" To the right, a box titled "Apply for Scholarships Here" contains a form with the question "What type of student are you?". Under the "Undergraduate" section, there are three buttons: "Incoming freshman", "Incoming transfer student", and "Current undergraduate student". Under the "Graduate" section, there are two buttons: "New Graduate School applicants" and "Current graduate students".

GOOD FOR ADMINISTRATORS

APPLICATIONS

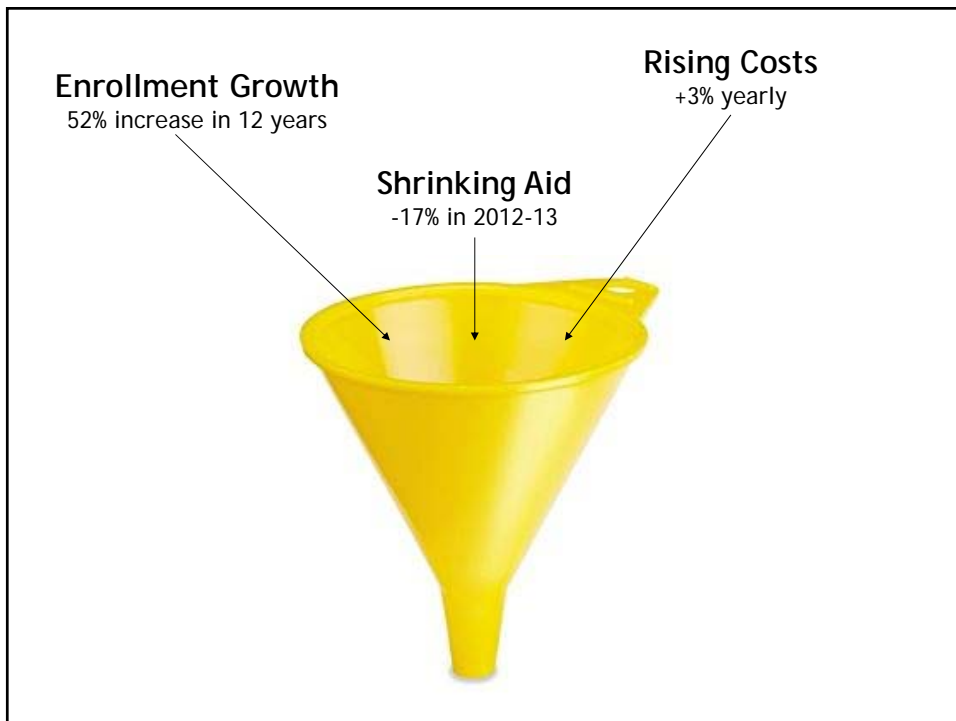
14,000 students
49,000 applications



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**BACKDROP FOR UNC CHARLOTTE'S
SCHOLARSHIP CENTRALIZATION**

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SCHOLARSHIP RE-ENGINEERING COMMITTEE
(2012)



UNIVERSITY SCHOLARSHIP OFFICE (USO)
2015

? QUESTIONS

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ANATOMY OF UNC CHARLOTTE'S
SCHOLARSHIP CENTRALIZATION

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Important preface...

- 1) All scholarships stem from donor gifts.
- 2) All scholarships are applied for.



BUDGET
STRUCTURE
ROLES

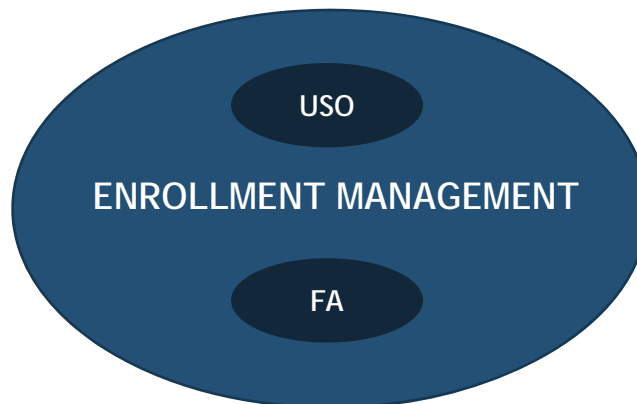


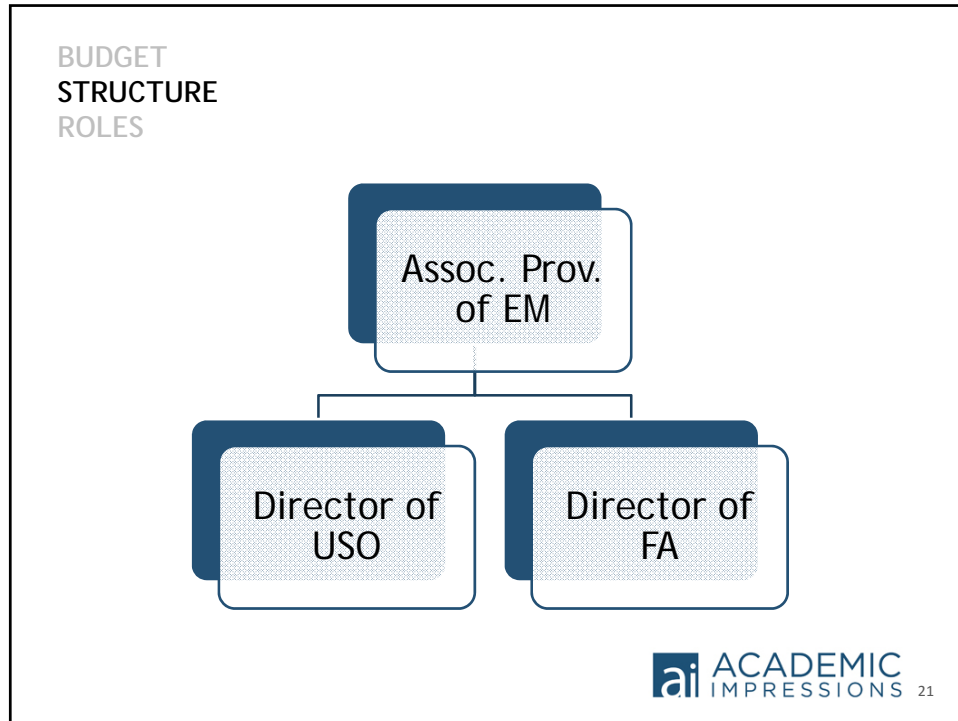
BUDGET
STRUCTURE
ROLES

- One-time startup = \$110K
- Personnel = \$200K/yr
- Maintenance of portal software = \$15K/month
- Printed literature = \$5k/yr

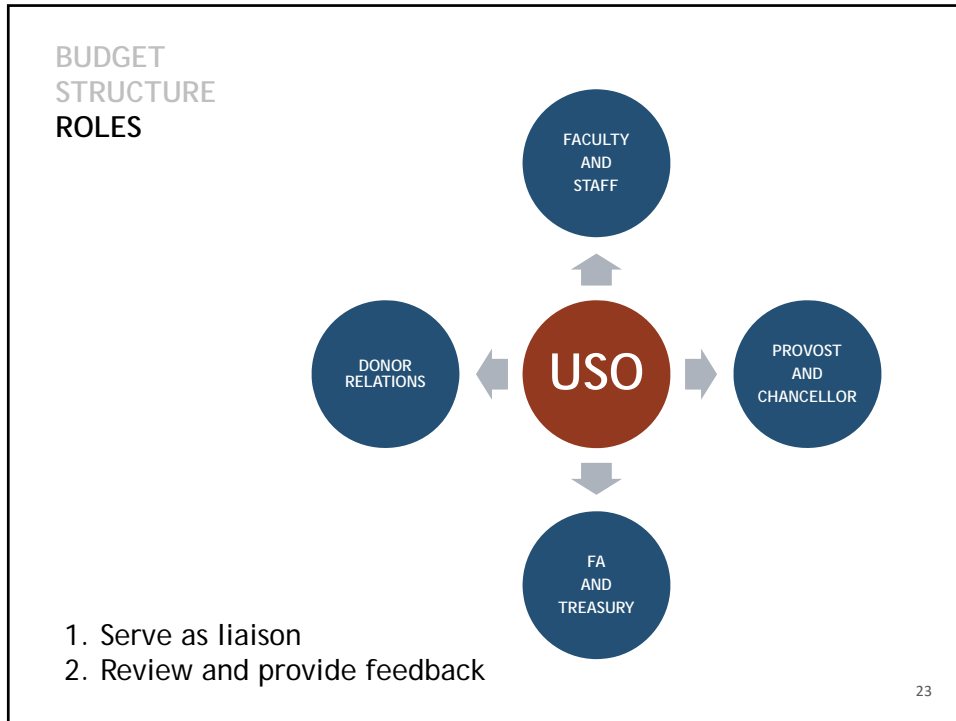


BUDGET
STRUCTURE
ROLES





- BUDGET
STRUCTURE
ROLES
- Director
 - Assistant director
 - Administrative support associate
 - PT graduate assistant
 - PT federal work study student
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? **QUESTIONS**

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ADVICE FOR GETTING STARTED ON YOUR CAMPUS



3 steps to centralize

1. Audit current state
2. Choose new state
3. Operationalize new state



AUDIT
CHOOSE
OPERATIONALIZE

a. Establish the right team.



RESOURCE

Titles for scholarship re-engineering committee

- Associate Provost, Enrollment Management Department
- Director, Stewardship Office
- Senior Director, Development Office
- Executive Director, Grants & Contracts Administration
- Director, Treasury Services Department
- Director, Undergraduate Admissions Office
- Business Manager to Associate Dean, College of Engineering
- Senior Associate Dean, The Graduate School
- Director of Development, College of Health & Human Services
- Associate Director, Levine Scholars Program
- Associate Director, Financial Aid Office
- *External Project Consultant*

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AUDIT
CHOOSE
OPERATIONALIZE

b. Develop a master scholarship database.

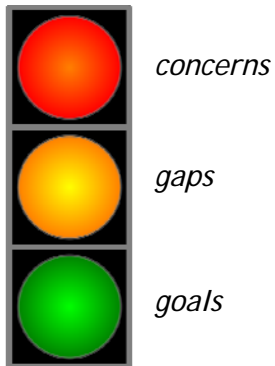


RESOURCE

Data points for master
scholarship database

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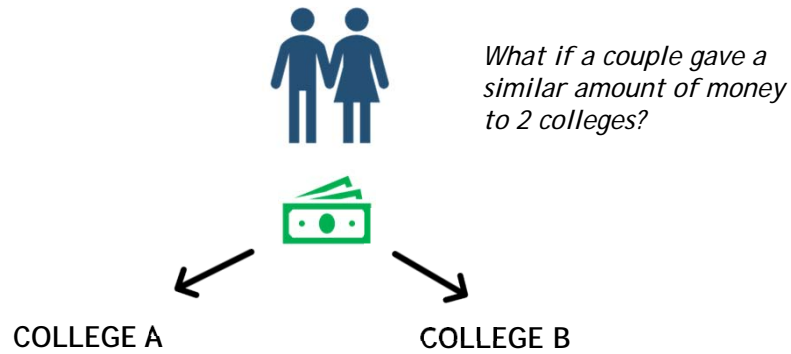
c. Identify concerns, gaps, goals.



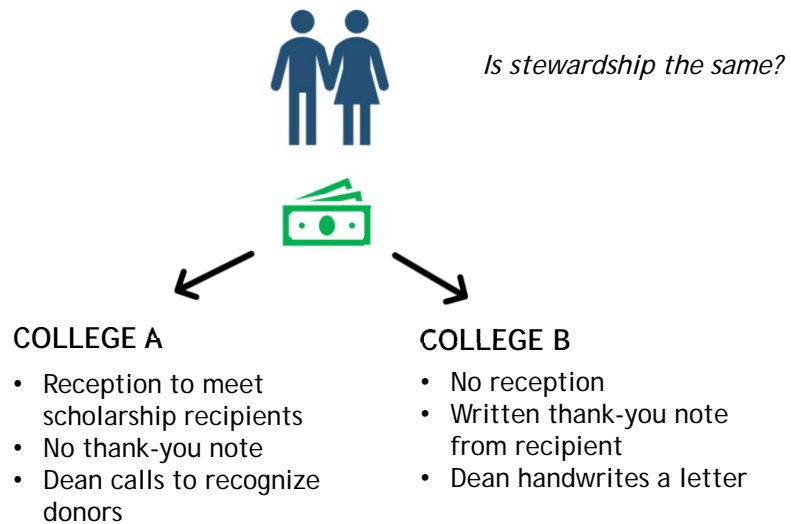
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d. Examine current stewardship practices.

d. Examine current stewardship practices.



d. Examine current stewardship practices.



AUDIT
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- a. Do external research.



RESOURCE

Questions to ask of other
institutions

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b. Do internal research.

Sometimes your best resources are in your
own backyard!



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c. Evaluate software options.



c. Evaluate software options.



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a. Create documentation.



RESOURCE

Table of contents from Policies & Procedures Manual



AUDIT
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- b. Establish a network of scholarship administrators.



b. Establish a network of scholarship administrators.



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c. Implement a marketing campaign to reach students.



RESOURCE

Sample marketing materials



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c. Implement a marketing campaign to reach students.

- Conduct a thorough review of your website to identify every page where scholarship applications / forms / instructions are given.
- Develop boilerplate language and logos with communication team.
- Work with admissions department to incorporate messages into letters, web pages, and events.
- Establish a blog or Twitter feed maintained by a student.





QUESTIONS






EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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