CALS Scholarship Allocation and Distribution System

A Case Study

► Unit(s): College of Agricultural and Life Sciences Academic Student Affairs Office

► Customers of the Process and Their Needs:

Prospective Students - need timely notification of scholarship awards as they make their college plans.

Continuing Students - need a simple and timely application and notification process.

Department Staff - need timely and accurate information on departmental scholarships and eligible applicants as they make their award decisions.

College Staff - need a dependable, simple to use, robust system for entering information about applicants and scholarships, allocating and tracking awards, notifying recipients and donors of awards, and creating various reports to support ancillary processes.

College Management - need statistical analyses and reports to assess and improve the ongoing role of scholarships in student recruitment and retention.

► Problem/Opportunity Statement: While the existing system was supported by a database system, it was still largely manual and very dependent upon the historical, anecdotal knowledge held by a small number of staff. As new people took on leadership roles with the scholarship system, we saw an opportunity to review and formalize scholarship policies, and to expand and improve the functionality of the automated system.

► Changes Made:

Policies – Working with the faculty scholarship committee, we reviewed and formalized many policies relating to our scholarship program. Policies are now documented in writing.

Data Warehouse – We incorporated student data in the data warehouse into the system in several ways: 1) during the application entry process, the system pulls as much data as possible from the warehouse, significantly reducing data entry time. 2) During the award allocation process, the system checks applicant status to ensure allocations only to accepted applicants and enrolled continuing students. 3) During the funds distribution phase, the system checks both enrolled status and credit level.
► **Results:** A new database system has been in operation for over a year. We now have more accurate and timely information in all stages of the scholarship allocation and distribution system. Knowledge of the system has been formalized and is shared by several different staff members. Deliverables such as reports, award announcements, and donor letters are created with greater accuracy and in a more timely fashion.

► **Next Steps:**

1) Continue to improve the automated system by adding new reports and fine-tuning processes.

2) Design and develop statistical reports for use in planning future directions for the scholarship program.

3) Work to automate the transfer of data between the CALS system and campus systems (student financial aid, accounting, bursar)

4) Design and develop a web based application form to eliminate all manual data entry.

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