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College Foundation Scholarship Process Improvement Plan

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INTRODUCTION

Scholarship support provided through the College at Oneonta Foundation to SUNY Oneonta makes up a substantial—and ever growing—portion of institutional scholarship resources. The College Foundation makes more than $2 million in scholarship resources available annually.

The majority of scholarships made available through the College Foundation are not application based. Instead, College Foundation scholarships are awarded by various offices and departments on campus. The two offices making the largest number of awards are Admissions and Financial Aid (roughly 75% of all College Foundation Scholarships); the remaining scholarships are awarded by various Academic departments.

While the majority of scholarship funds are allocated, awarded and distributed in a timely fashion, unawarded scholarships exist creating challenges on multiple fronts for the organization.

Successful administration and utilization of the College Foundation's scholarship resources serve the financial and educational interests of SUNY Oneonta's students, the strategic priorities of the college, and the principals of affordability and access on which the SUNY system was founded. Further, the College Foundation's ability to continue to grow its endowment, through charitable contributions, is dependent on the College's ability to successfully steward scholarship donors. Full and successful administration of all scholarship resources is necessary for effective stewardship to occur.

DELIVERABLES

Descriptive Process Review/Definition

To assist stakeholders to gain a comprehensive understanding of the full scope of the various steps involved in the awarding process in place at the start of the 2016-17 academic year, a Process Map, and Program Flowchart were created.

A) **Narrative Process Map**: Step-by-step breakdown of the major tasks in the College Foundation scholarship awarding process as of the start of the 2016-17 academic year.

B) **Scholarship Awarding Process Flowchart**: A visual representation of the scholarship awarding process in place at the start of the 2016-17 academic year. Illustrates the process flow between and among the many offices and units.

Process Improvement Recommendations

A) **Simplify/Automate Data Transfers**: Data transfers in the existing process required manual transcription of scholarship account numbers, identification codes, and allocations(award amounts). This recommendation seeks to mitigate risk for data errors and to speed data transfers.

B) **Adoption of Formal Timeline and Schedule for Scholarship Process**: The lack of a formal, documented, consistent annual schedule for major scholarship process activities made target setting and meaningful year-to-year awarding process comparisons difficult. This recommendation seeks to standardize timing, with consideration given to schedules of teaching faculty as well as the needs of Offices of Enrollment Service and Student Accounts.

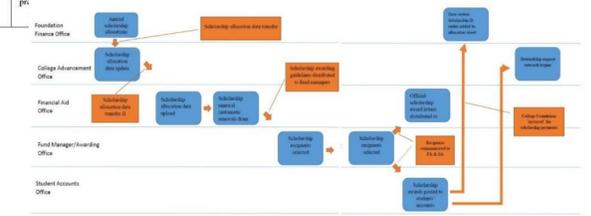### Communication and Documentation Improvement Recommendations

A) **Modification/Improvement of Fund Manager Communications**: Fund manager (individuals/units charged with awarding scholarships) communications in place in 2015-16 loaded with institutional jargon, overly formal and bureaucratic. Recommendation focused on providing reader a more accessible, user friendly form, while providing greater context for importance of timely scholarship awarding.

Policy and Practice Related Recommendations

A) **Adoption of Scholarship Awarding Rollover Policy for Unawarded Funds**: Vast majority of unawarded scholarships in any given academic year are those with awarding responsibility of the various academic or service departments. Policy would establish cut off date for scholarship awarding, after which, awarding authority for remaining unawarded scholarships would transfer, for current awarding year, to Office of Financial Aid.

Narrative Process Map and Flowchart

Scholarship Awarding Process Narrative

APPROACH

SUNY Oneonta's scholarship awarding process is multi-faceted and heavily compartmentalized with multiple units performing singular functional pieces of the process. For insight and accuracy in creating the Narrative Process Map and Flowcharts, I consulted with representatives from the Offices of Admissions, College Advancement, Foundation Finance, and Financial Aid. For context and insight on existing program design—and to inform recommendations– I consulted with my counterparts at similarly positioned colleges and universities in the SUNY system. Selected institutions included: University of Albany, Buffalo State, University of Buffalo, SUNY Cortland, Empire State College, and SUNY Potsdam.

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Content appearing on this research poster was created with brevity in mind. If you have questions, would like more information, or are interested in engaging in a more in-depth discussion on this capstone project, please contact me at: msulli13@binghamton.edu.