

# Case Study

## Guidelines and Processes: A Blueprint for Effective Scholarship Management

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### Client

A group philanthropy located in the Chicago metro area, dedicated to promoting educational access and equity through various scholarship opportunities. Each year, they provide numerous scholarships to students from diverse backgrounds, aiming to support their educational journeys and foster a culture of philanthropy within the community. Committed to making a meaningful impact, the organization engages a network of donors, volunteers, and community partners to enhance their scholarship offerings and ensure that financial barriers do not hinder students from achieving their academic goals.

### Problem

The scholarship program suffered from a lack of clear guidance and documentation from the numerous scholarship donors who had invested over time. That resulted in varied interpretations among leadership, volunteers, and applicants. This, combined with limited knowledge of IRS guidelines and allowable actions, contributed to widespread confusion. The absence of both explicit scholarship guidelines and understanding of compliance requirements made it challenging for the team to manage the program effectively and for applicants and recipients to navigate processes.

### Deliverables Provided

#### Guiding Program Documents

- Conducted **Data Collection and Analysis** to provide insights into students' demographics and financial circumstances.
- Facilitated a **Program Strategy Session** to align around intended goals, outcomes, and impact.
- Created a **Scholarships Policy** outlining the goals and operational procedures.
- Established an **Annual Scholarship Timeline** to streamline application, selection, and awarding phases.
- Crafted **Committee Member Job Descriptions** to clarify roles and responsibilities, enhancing accountability.

#### Marketing and Outreach Strategies

- Designed tailored **Stakeholder Communications** to engage key groups:
  - Donors and volunteers to raise awareness.
  - Current applicants and recipients to encourage applications.
  - Previous recipients to serve as ambassadors.

- General community and mission partners to broaden outreach.

### Application and Selection Process Improvements

- Developed clear **Scholarship Criteria** to guide applicants and the selection committee.
- Created a **Selection Process Guide** to ensure fair and consistent evaluation.
- Set up forms for streamlined data collection:
  - **Committee Member Conflict of Interest** to ensure transparency.
  - **Scholarship Application Form** for applicants.
  - **Scholarship Evaluation Form** for committee assessments.
  - **Recipient Information Form** to collect necessary data post-award.

## Results

The client reported:

- Increased clarity and transparency in the application and selection process.
- Ensured compliance with legal and tax regulations, adherence to industry best practices for ethical scholarship awarding.
- Enhanced engagement from committee members.
- Improved committee efficiency, leading to quicker award decisions and streamlined evaluations.
- Higher stakeholder satisfaction, with positive feedback from donors, volunteers, and applicants about the clarity and effectiveness of the new processes.
- Strengthened relationships with students, donors, and volunteers due to improved communication and engagement strategies.
- Increased donor confidence in the scholarship program, resulting in positive discussions about potential future funding and support.

This structured approach not only strengthened the scholarship program but also fostered greater community involvement and trust in the group's commitment to supporting education.

## Conclusion

By systematically addressing the challenges, we were able to create a comprehensive and effective scholarship program that not only met the needs of students but also aligned with the group's mission.

## Client Feedback

*"We are so satisfied and pleased with everything Students First Consulting has done for us."*  
Executive staff member

*"Worth every penny!"*  
Scholarships committee member

