Students First
CONSULTING

Scholarship Success:
91 Bright Ideas to Test & Try!

Sourced from the [NSPA Resource Library](#) and peers in the field. If you're having trouble seeing linked resources, it may be because they're restricted for viewing to NSPA's members. If you're not already an NSPA member, we strongly encourage you to [become one today](#)! It's an incredible community and there are so many learning opportunities for scholarship providers.

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PROGRAM STRATEGY

- **Get clear on your purpose and who you want to serve.** Check out [Student First Consulting's Program Purpose Worksheet](#).

- **Create guiding documents - and use them!** Here's a [sample logic model](#).

- **Center students, higher education, and career attainment in your organization's mission, vision, and values.** Keep this in mind in the development of your purpose and logic model.

SCHOLARSHIP DEVELOPMENT

- **Use your identified purpose and target student population.** For example, put the summary of your program purpose in all donor communications. It might sound something like this:

    > **About Our Scholarship:** *Our renewable scholarships and emergency fund programs aim to help low-income students from our rural community graduate from higher education programs, so that they can have personal and professional opportunities that enrich their lives and our community.*

- **Inform donors using data, student photos and videos, and student stories.** For instance, use internal and external data such as this in donor education materials:

    - *"Learn about [today's students](#)."*
    - *"Did you know? College is much more than tuition and fees. ['The total cost of attending a postsecondary institution includes the sum of published tuition and required fees; books and supplies; and the average cost for room, board, and other expenses for an institution.'"](#)*
    - *"According to research: ['...Tuition and fees represent less than 40 percent of the total cost of attendance for students attending four-year public colleges and universities, and just one-fourth of the cost of attendance for community college students."](#)*

Victoria, pictured, is one of the fund's recipients. She'll receive a $10,000 scholarship next year as she works to complete her Computer Science degree at Florida A&M University. She's currently a Software Engineering Intern at JP Morgan Chase, and when she's not studying or working, she's using her skills to teach kids how to code or developing mental health support apps.

- **Develop policies, guidelines, and worksheets and use them consistently.** Here's a sample [Community Foundation Scholarship Policy.](#)

- **Ask donors targeted questions, then have the scholarship experts (you!) develop the opportunity.** Any criteria setting should be done *after* the meeting, by Scholarships staff, not during this information-gathering meeting. To inform this, you might ask donors:

  > *"What impact do you hope to have with this scholarship?"*
  > *"What characteristics do your ideal recipients have?"*
  > *"Tell us what a mission statement for your potential fund might be."*
  > *"What are the most important aspects of this scholarship and why?"*
  > *"How will this fund be a part of your legacy?"*

MARKETING

- **Use channels most relevant to the students you serve**. Get inspiration via [Thurgood Marshall College Fund's TikTok channel](#).

- **Use media that reflects the diversity of the students you want to serve.** Check out the real-recipient photos and quotes on the [Community Foundation of North Central Washington's Scholarships landing page](#).

- **Use succinct, explicit, jargon-free language.** We like how the [Central Indiana Community Foundation](#) keeps theirs short, to the point, and in large font.

- **Analyze your applicants and recipient pools, then compare them to your target population.** Here's a table to inspire your analysis:

Demographic Group	Our Community	2022 Cycle	2023 Cycle
Gender	% Man, Woman, Trans/Non-binary		
Race/Ethnicity	% American Indian or Alaska Native, Asian or Asian American, Black or African American, Hispanic or Latino/a/e/x, Native Hawaiian or Other Pacific Islander, White, Multiracial		

LGBTQIA	% Identifying as part of the LGBTQIA community		
First-Generation	% first-generation college students		
Veteran/Military Family	% veterans or in a military family		

APPLICATION DEVELOPMENT

- **Lead with your programmatic intent when determining application questions.** For example:

  - *For a needs-based scholarship: What information must you collect about financial need?*
  - *For a career-pipelining scholarship: What information must you collect about career interests, plans, and preparedness?*
  - *For emergency funds: What information must you collect about immediate, unforeseen needs?*

- **Humanize the application.** Ask students to share about themselves in ways that make sense to them.

  - *"Describe a day in your life."*
  - *"Tell us about how you've progressed along your educational journey - what you enjoy, what's been challenging, how you learn, and what or who has been helpful."*
  - *"You selected 'Other'. Tell us more in your own words."*

- **Consider students' economy of time.** Ask students (current applicants or a test group!) how long it takes to complete your application. Then assess that against the likelihood of their being selected and the award amount. For example, while it seems reasonable that a one-time, $1,000 scholarship should take between 15 and 30 minutes for a student to complete, it may not be reasonable to have that same scholarship require multiple hours to complete.

- **Eliminate uploads in favor of fillable fields.** And trust that students are telling the truth!

- **Don't ask for information that you don't plan to use.**

- **Use checkboxes to allow students to self-report financial circumstances.** This [example from the Dougherty Foundation](#) can inspire which checkboxes go on your list. And trust that they are responding honestly!

- **Take inspiration from peers in the grantmaking world.** The team behind [the #FixtheForm initiative](#) has conducted research into application form best practices. Their materials have lots of ideas for simplifying, streamlining, and right-sizing.

SELECTION & COMMITTEE MANAGEMENT

- **Use job descriptions** (perhaps modeled after this [Selection Committee Job Description Template](#)) to recruit committee members.

- **Develop easy-to-understand and -use scoring rubrics for student-experience questions**, like these:
    - *University of Alberta's [Grit Assessment Rubric](#)*
    - *Wenatchee Valley College [Scholarship Evaluation Guide](#)*

- **Collect feedback from committee members and update future opportunities accordingly.** Send out a survey such as this [Scholarship Review Volunteers Survey](#) after the review period.

- **Offer an anti-bias training like this to your committee:** [Durham Public Schools Foundation's Equity Guide for Review Committee Members](#)

AWARDING

- **Tell students about the potential taxability of scholarships.** Here's sample language from the [Triangle Community Foundation award letter](#).

    > *Please note that any portion of the scholarship exceeding (i) tuition and fees required for enrollment or attendance at the educational institution, and (ii) fees, books, supplies, and equipment required for courses of instruction **are taxable income**. Scholarship funds will be included in your 1098-T form, sent to you annually by your school. This information should be reported in your annual tax filing.*

- **Make awards towards student's total cost of attendance.** Use these resources to help your organization's leadership and donors understand the need:

- ○ *Rising Above the Threshold: How to Increase Equitable Postsecondary Value* (June 2023)
  - ○ *Still Hungry and Homeless in College* (April 2018) Actions for colleges, universities, policy makers, and scholarship providers are outlined on pages 34-39.

- **Be flexible with students.** Here are ideas from Student First Consulting's Time Out! How to Manage Gap Years & Student Leave mini-session.

- **Move to using ACH payments** to help reduce the administrative burden of mailing letters and checks and reduce the likelihood of late or missed payments. Talk to your software provider to ask if this is an option.

STUDENT ENGAGEMENT

- **Use a chatbot or texting service for FAQs and follow ups**, such as ZenDesk or Mainstay.

- **Maintain scholarships even if students struggle to engage with donors.** Read this article from Inside Higher Ed and thoughtfully consider what you require from students. Remember that the donor relationship is your responsibility, not your students'.

- **Consider offering support services such as mental health counseling, mentoring, and emergency funds.** If your organization doesn't have the capacity to offer these services, you can find a partner to administer them, such as iMentor.

ALUMNI ENGAGEMENT

- **Check out these ideas on how to involve and engage your alumni** from Coca-Cola Scholars Foundation:

  - ○ *Have alumni serve as Coaches*
  - ○ *Develop an Alumni Board*
  - ○ *Have alumni participate on the organization's Board of Directors*
  - ○ *Have alumni participate on or lead selection committees*
  - ○ *Have alumni lead virtual events for scholars, including*
  - ○ *Regional networking events for alumni*
  - ○ *Create a scholar- and alumni-only engagement and networking platform*
  - ○ *Create Instagram, LinkedIn, and Facebook groups for alumni*
  - ○ *Have alumni organized events with scholars in their region*

PRIVATE PROVIDER & INSTITUTIONAL RELATIONS

- **For Institutions:**

    - **Post clear timelines, contact information, and awarding policies on your website.** See this sample language from Texas A&M University:

        Texas A&M University will divide scholarship payments of $1,000 or more equally for the Fall and Spring semesters unless otherwise requested by donors. Payments for less than $1,000 will be applied as follows, unless otherwise specified in writing, by the donor:

        - *Scholarship checks received after July 1 will be applied to the Fall semester*
        - *Scholarship checks received after November 1 will be applied to the Spring semester*
        - *Scholarship checks received after May 1 will be applied to the Summer semester*
        - *Donors may email scholarships@tamu.edu with instructions. Click here for more policy information.*

    - **Clearly list information and instructions for aid displacement.** Check out [Stanford University's Outside Awards](#) page or consider sample language from [Northwestern University](#):

        When adjusting a student's need-based award, an outside scholarship will reduce or replace the self-help portion of the student's award (Federal Work-Study or need-based loans) prior to reducing Northwestern Scholarship. Therefore, outside scholarships benefit students by reducing the need to work or borrow to help finance their education.

- **For Private Providers: Provide clear communication in award letters for amount, uses, and distribution.** Use this [Example Grant Letter to University](#) as a guide.

DONOR ENGAGEMENT

- **Create optional built-in donor thank-you notes or video uploads in your application process.** Just don't penalize students for not completing them!

- If you don't have thank-you notes from a scholarship's specific recipients, **use whatever information you do have to describe recipients, or tell stories of students similar to those awarded.**

    "Your generosity helps to ensure that students just like [Name] can be on campus this fall, poised and ready to complete their first year of college."

- **Plan scholar receptions for your donors and their scholars**. Invite committee members, families, and have some alumni share their stories of impact. Consider inviting other community members too–those from scholarship providers, funders, and student-serving and community-based organizations–so that they can meet and learn from your students. You can serve food and offer certificates or plaques to honor your scholars. But please don't require scholars to attend - they're busy people and often have competing priorities, including classes, studying, work, and other commitments!

- If large gatherings don't work for your organization, you can also **facilitate one-on-one meet-ups**, such as a lunch with a donor family and their scholarship recipients or a campus tour.

- **Provide donor education opportunities and try to involve students.** Here are some ideas:

    - *Plan a visit to campus for your donors. Include essential student services, such as career center, health center, and food bank.*
    - *Invite donors to shadow students for a day to see what it's really like to be a student today.*
    - *Create an information event that showcases a student panel. Have local education experts share data on current trends and needs, and have students share their personal experiences.*

LEADERSHIP & STAFF ENGAGEMENT

- **Decentralize scholarship activities.** Integrate scholarship work across the organization by inviting colleagues from departments such as Administration, Marketing and Communications, Finance, Development, and others to participate in projects. This allows them to learn about (and help inform) best practices, and get to know students.

- **Invite all staff to participate in the scholarships lifecycle.**

    - *Need to create a short list of top applicants before moving to selection? Create an internal staff review team.*

- ○ *Have an emergency fund with a rolling deadline? Create a standing review committee.*
  - ○ *Planning a scholar reception? Ask your colleagues to manage aspects of the event planning.*
  - ○ *Want to feature students in your marketing and outreach? Share information about current scholars with your Marketing team and have them feature a student in your monthly newsletter or social media.*

- **Share stories about your scholars with staff.**

  - ○ *Reserve three minutes at every staff meeting to talk about a scholar and their goals.*
  - ○ *Have a standing agenda item at Board meetings to highlight a scholarship program and current scholars.*

- **Ensure scholar-facing staff are involved in scholarship development and organizational-level decisions, and create norms and practices to support this.** For example, Development staff and Scholarships staff should agree on the following keys to mutual success:

  - ○ *Development and Scholarships teams working closely together, with clearly defined and delineated roles and responsibilities:*
    - ■ *[Name of team member] will take on [X, Y, Z] tasks in the scholarship development process.*
    - ■ *We will meet on [schedule] and communicate via [channels].*
    - ■ *We will stay centered on students and their needs by [these methods].*
  - ○ *Staff on these teams should share an understanding of:*
    - ■ *Our community's students and their needs*
    - ■ *The donor's desired impact*
  - ○ *We commit to seeking opportunities to:*
    - ■ *Educate donors about students*
    - ■ *Effectively match students with with donors who are eager to support them*

EVALUATION

- **Work with other providers.** Aggregate multiple organizations' scholarship data and harness what we all know to improve student outcomes more broadly. This might start with aligning common language and sharing data across organizations.

- **Include a short applicant survey in your application.** Here are some sample questions to ask.

- **Build in time for evaluation in your annual timeline.** See the example calendar below.

MONTH	EVALUATION METHOD	HOW TO USE INFORMATION COLLECTED
JANUARY	Send and analyze mid-year scholar survey data	Identify impact on recipients Identify and follow up with scholars with emergent issues
FEBRUARY	Analyze tagged correspondence for anecdotal feedback	Identify/implement day-to-day process revisions Identify/implement Policy updates
MARCH	Run and analyze quarterly KPI #/$/% data	Share award/scholar in quarterly Board meeting reports
APRIL	*Focus on scholar selection*	
MAY	Analyze tagged correspondence for anecdotal feedback	Identify/implement day-to-day process revisions Identify/implement Policy updates
JUNE	Run and analyze quarterly KPI #/$/% data	Share award/scholar in quarterly Board meeting reports
JULY	Send and analyze alumni survey data	Share in annual report
AUGUST	Analyze tagged correspondence for anecdotal feedback	Identify/implement day-to-day process revisions Identify/implement Policy updates
	Send and analyze survey data from recipients whose awards just ended	Identify/implement day-to-day process revisions Identify/implement Policy updates
SEPTEMBER	Run and analyze quarterly KPI #/$/% data	Share award/scholar in quarterly Board meeting reports
OCTOBER	Analyze tagged correspondence for anecdotal feedback	Identify/implement day-to-day process revisions Identify/implement Policy updates
NOVEMBER	Run and analyze annual KPI #/$/% data	Share in annual report
DECEMBER	Run and analyze quarterly KPI #/$/% data	Share award/scholar in quarterly Board meeting reports

- **Commit to (and budget for) process and impact evaluations every three to five years.** Talk to consultants like Students First Consulting about budget estimates and share with your leadership to plan your approval and implementation timelines.