Students First
CONSULTING

Scholarship Program Playbook

Your Essential Guide to Creating & Managing Impactful Scholarship Programs

About This Playbook

This guide is for organizations, teams, and individuals that want to create and manage effective scholarship programs. It's designed to help you build a student-centered approach, ensuring that your efforts are not only about providing funds, but about fostering student success and persistence.

The playbook is structured into several key sections, covering the entire scholarship lifecycle:

- Program Strategy
- Scholarship Development
- Marketing
- Application Development
- Selection & Committee Management
- Awarding
- Student Engagement
- Alumni Engagement
- Private Provider & Institutional Relations
- Donor Engagement
- Leadership & Staff Engagement
- Evaluation
- Remediation for Scholarship Program Issues

Have Questions or Need Support?

Get in touch! We're here to help you make your program a success.

- **Schedule a Free 30-Minute Consultation**
- **Email:** info@studentsfirstconsulting.org
- **Website:** www.studentsfirstconsulting.org

Program Strategy

- **Clarify your purpose and who you serve.** Before developing any program, get clear on your "Why?" and your "Who?". Our Program Purpose Workbook can help.

- **Work with others in your community to identify high-priority student populations.** We love this idea that community foundations in Michigan introduced us to. Who in your community can most benefit from help getting to and through college? Maybe it's foster students, or adult students who never completed returning later in life. Then consider giving high-priority student populations extra weight in your scoring rubrics.

- **Create and use guiding documents.** Develop essential documents like a logic model to outline your program's purpose and goals. Here's a sample scholarship program logic model.

- **Like the rest of your work, keep these resources meticulously documented**–this is essential for transparency, accountability, and long-term organizational and program health.

- **Incorporate student voices into strategic planning.** Include students in program advisory groups to ensure your mission, vision, and values are centered on students, higher education, and career attainment.

Scholarship Development

- **Inform donors with data and stories.** Use data from sources like the Lumina Foundation, Opportunity Atlas, and the National Center for Education Statistics to educate donors on the realities of today's students.
    - For example, share Lumina Foundation research, like the fact that 34% of college students are 25 or older, and 50% are first-generation.
    - Or discuss students' challenges, such as the Hope Center's data showing that 59% of students are affected by at least one form of basic needs security.

- **Create and share a robust program report, with both existing donors and in new donor cultivation.** Use our full Scholarship Impact Program Report template, or copy and paste sections to customize a report specific to your program.

- **Showcase students and their successes.** Use student photos, videos, and stories to create a personal connection for donors. This can be as simple as sharing excerpts from student thank-you letters. Be sure to inform students how what they share will be used.

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Scholarship Development, continued

- **Develop flexible, high-impact programs.** One way to do this is by creating pooled funds that allow donors to contribute at any level and support one or more high-priority student populations, like the Ann Arbor Community Foundation, the Austin Community Foundation, and Cape Cod Foundation have done.

- **Think beyond traditional students.** Recognize the diverse needs of students in your community.
  - For example, the Miami Foundation has a focus on student parents. According to the Institute for Women's Policy Research, 18% of undergraduate students are parents, most of whom are single mothers attending community college. Fewer than 2% of teen moms earn a college degree before age 30.
  - We love the adult scholarships and workforce scholarships offered by the Heart of Illinois Community Foundation, helping ease the transition of adults and graduates into meaningful careers.

- **Engage donors in meaningful conversation about their "Why?" instead of letting them drive operational tactics.** 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. We've got donor conversation agendas in our Audit-Ready Toolkit; they use questions like:
  - "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?"

- **Establish clear policies.** We recommend a guiding, comprehensive scholarship policy that outlines all policies and practices you employ. Consistently use these policies to ensure all processes are fair and transparent. The National Scholarship Providers Association Resource Library has sample scholarship policies, or you can find templates in our Audit-Ready Toolkit.

Scholarship Development, continued

- **Document everything that happens in the scholarship development process.** From strategy to implementation, track and save it all. Here's what to make sure to document:
  - Program strategy
  - Donor conversations
  - Agreements
  - Policies & procedures
  - Recipient records
  - Donor conversations
  - Updates
  - Board approvals

Marketing

- **Market using channels that today's students use.** Messaging and videos can land better than emails. We love Thurgood Marshall College Fund's TikTok channel, with videos about their scholarship opportunities. We especially love that they have students make them! Think about having scholars, interns, or student advisory members create yours.

- **Simplify the language you use.** Scholarship and/or higher education jargon is a no-no. Review your messaging for jargon-y words or phrases. Instead, use succinct and explicit language, avoiding things that might confuse students. Not sure what to keep? Ask student advisory members to review your communications for content that could be easier to understand.

- **Have your materials reflect the diversity of your student population.** Use real recipient photos and quotes (with their permission, of course). Check out Grays Harbor College Foundation student stories for inspiration. You can build your own student showcase, simply using student photos and information they share in your application and acceptance forms.

- **Understand your reach, and build from there.** Regularly review and analyze data from your applicant and recipient pools. Compare that information to your target population. If you're not reaching the students you need and want to reach, shift gears and try new tactics.

Application Development

- **Prioritize application simplicity and programmatic intent.** In general, we recommend that applications include *only* contact information, information to help you determine eligibility, and information needed to determine a student's fit with your scholarship's purpose. For example, for a needs-based scholarship, you should collect (limited) financial need information, but if it doesn't matter for your scholarship, don't ask for it.

- **Create an application that can be easily completed on a phone.** Estimates are that 60-80% of students use their phones to access education-related content and resources (we've seen similar stats for mobile access of scholarship applications). Remove elements like uploads that can't be completed on a phone. This might include problem-solving with your application tech vendor.

- **Create an application that's readable–and completable–for students of all abilities.** Focus on a strong visual design with high contrast, legible fonts, and ample spacing. The application should also be fully navigable using only a keyboard, and you should provide descriptive alt text for any images to support screen reader users. Ensure the content is structured logically with clear headings and subheadings, and offer simple, step-by-step instructions with clear error feedback. You could also offer flexibility by avoiding strict time limits and allowing students to save their progress.

- **If your application requires multi-factor authentication:** Most MFAs often require both email addresses and cell phone access, but most students can't use their phones at school, so can't complete MFA-required forms. Create a workaround for students to be able to complete your application anywhere, including at school.

- **Humanize the application.** If you need to know about a student's story or circumstances, ask questions that let them share about themselves in their own words. We love prompts like, "Describe a day in your life" or "Tell us about your educational journey."

- **Encourage completion.** We love how the Community Foundation for the Ohio Valley includes statements like, "We want you to succeed!" and "Start early, take your time and put together an application that makes you proud!" to show students they care and want to hear from them.

- **Trust students.** Eliminate official transcript and verification document uploads, opting for fillable fields and self-reported information. Trust that students are being honest.

Application Development, continued

- **Get rid of recommendation letters and opt for better, more self-reflective questions of students.** Recommendations are nearly always form letters with limited to no valuable information. Plus, making students get them creates unnecessary hoops. You can get that same information self-reported from students, if you're thoughtful with your questions.

- **Simplify financial need questions (and assessment).** There are easier (and safer) ways to understand if students have financial need than asking them to upload unsecured tax documents or student aid reports. Check out our Quick Guide: Assessing Financial Need to get inspiration on streamlining how you ask about and evaluate financial need.

- **Respect students' time.** Assess how long your application takes to complete. The time commitment should be reasonable in relation to the scholarship award amount. Have student advisory committee members determine this for you, or ask a question at the bottom of your application, such as, "How long did it take you to complete this application?"

- **Learn from grantmaking peers.** Take inspiration from the #FixtheForm initiative for ideas on simplifying and right-sizing your application.

Selection & Committee Management

- **Use job descriptions to recruit committee members,** with well defined roles and expectations.

- **Use objective scoring rubrics.** This is a must! Not using them can impact IRS-required objective and nondiscriminatory selection. They should be Board approved, easy to understand and use, and you should train your reviewers on them. Use them for every scholarship, committee member, and application reviewed. The NSPA Resource Library has samples to inspire you.

- **Use the IRS regulations to make the case for best-practice selection.** This includes using rubrics, standardized processes, and organizational control of selection.

- **Host "office hours" for reviewers.** They can get advice and answers from your expert team.

- **Provide anti-bias training.** Offer training, such as the Durham Public Schools Foundation's Equity Guide, to your committee members to promote a fair and equitable selection process.

- **Gather and use feedback from evaluators.** After the review period, survey committee members to get feedback and make updates for future cycles. This Foundant Technologies article has guidance on surveying reviewers, plus a sample reviewer survey.

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Awarding

- **Educate students on scholarship displacement.** Direct them to this webinar hosted by Cape Cod Foundation, or customize our displacement deck and present to your students and their families.

- **Educate students on the taxability of scholarships.** Inform recipients about the potential tax implications of their scholarship funds using clear and simple language, such as:
  - Scholarship funds are included on your annual 1098-T form from your school and should be reported on your yearly tax filing. Please note that any part of the scholarship exceeding (i) tuition and fees required for enrollment or attendance at your educational institution, and (ii) fees, books, supplies, and equipment required for instruction, is considered taxable income.

- **Make scholarships that cover all expenses included in a student's total Cost of Attendance, not just tuition.** Use resources like "Rising Above the Threshold" and "Still Hungry and Homeless in College" to educate your organization's leadership and donors on this need.

- **Make renewable awards.** Renewability helps to ensure a student's access to, and persistence through, all the way to degree or credential completion. Plus it helps long-term relationship-building, which fosters alumni engagement and a better sense of outcomes.

- **Add in as much flexibility to your awards as possible.** This means offering leniency around gap years or terms, or health, personal, family, academic, or financial leaves. Students are humans too! Honor them and your investment in them, be realistic about life's unpredictability, and empower their persistence. Create a policy, develop a tracking system, and ensure open, consistent communication. Here's a blog post to guide you.

- **Make start-up or completion awards.** These can support unanticipated gaps, whether it's early-term needs or end-of-program balances. Here's an article on creating your own start-up grant program.

- **Simplify payments.** Use ACH payments to reduce the administrative burden of mailing checks and minimize the risk of late or missed payments.

- **Consider using 529s to award scholarships.** We have tons of information on this approach; check out our blog post with FAQs and our expert advice, or start with the research we did on awarding challenges.

- **Pay students' loans.** You can develop programs to repay them after graduation, or even during a student's enrollment (especially unsubsidized loans).

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Awarding, continued

- **Create an emergency fund, or test out a scholarship hotline model.** A modest emergency fund grant can make all the difference between staying in school or stopping/dropping out–here's our how-to guide. And, as we describe in this blog post, a scholarship hotline streamlines the idea even further.

Student Engagement

- **Use videos for important recipient-facing communications.** Here's a great example from the Leukemia & Lymphoma Society scholarship, on how they offer scholarships through 529s.

- **Use a chatbot or texting service for FAQs and follow ups.** Services include ZenDesk or Mainstay, and they can automate answers to frequently asked questions, giving students immediate responses during peak seasons and freeing up staff time. They can also be used to send out proactive reminders and updates about deadlines or award notifications.

- **Maintain scholarships even if students struggle to engage with donors.** Read this opinion piece from Inside Higher Ed (written by a scholarship recipient) and thoughtfully consider what you require from students. Remember that the donor relationship is your responsibility, not your students'.

- **Consider offering additional support services such as mental health counseling and mentoring.** Take inspiration from St. David's Foundation's Neal Kocurek Scholarship Program and their comprehensive approach to student support. Their program provides substantial financial awards, holistic support for mental health, personalized check-ins, professional development, mentorship, and diverse educational resources to cater to varied learning styles. If your organization doesn't have the capacity to offer these, find a partner to administer them, like a community-based organization or iMentor.

- **Use auto-responders to proactively answer common questions during peak seasons.** Inspired by the Greater Kanawha Valley Foundation, set up an auto-responder during peak seasons that includes responses with answers to frequently asked questions. Questions you might answer in your auto-responses include:
    - "Are there currently any scholarship opportunities available?"
    - "I received a scholarship. When will it be credited to my student account?"
    - "Where can I send a thank you note?"
    - "My college plans have changed. What do I need to do?"

Alumni Engagement

- **Create engaged alumni by offering meaningful, long-term awards.**

- **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

- **Survey alumni to gauge your scholarship's impact on them.** This Foundant Technologies article has guidance on surveying alumni, plus a sample alumni survey.

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 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!

- **Use whatever information you do have to describe recipients,** in cases where you don't have thank-you notes from a scholarship's specific recipients. You can also tell stories of students similar to those awarded. Use language such as, "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."

Donor Engagement, continued

- **Create and share a robust program report with current donors as well as new ones.** Use our full Scholarship Impact Program Report template, or copy and paste sections to customize a report specific to your program.

- **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.

- **Facilitate one-on-one meet-ups.** These are great alternatives to big events and can include 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

- **Integrate scholarship work across the organization.** Invite 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.

Leadership & Staff Engagement, continued

- **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

- **Use a logic model to guide your actions and evaluation.** Here's a <u>sample scholarship program logic model</u>.

- **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.

- **Survey applicants and recipients.** <u>This Foundant Technologies article</u> covers surveying both, plus has sample questions.

Evaluation, continued

- **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.

Remediation for Scholarship Program Issues

- **Commit to fixing problem opportunities or funds.** If a scholarship program isn't working as intended, don't let it sit on the shelf. Address the issues head-on to prevent issues from recurring. Remember: You need to successfully make awards to have an impact on students!

- **Gather all documentation.** Before making changes, collect all necessary documentation, including program strategy, donor agreements, and Board approvals. If documentation is missing, work as hard as you can to get it. (Then keep it organized!)

- **Work with living donors.** If the original donor is still living, work with them to make changes to the fund agreement that will allow the scholarship to be awarded more effectively.

- **Seek appropriate legal channels if necessary.** If the donor is no longer living, you may need to work through formal legal channels, such as contacting the state attorney general, to modify the fund's purpose.

- **Communicate with transparency.** Be transparent with your Board and stakeholders about the challenges and the proposed solutions. Present data and stories to show why the changes are necessary to better serve students. Document your changes.

Your Next Steps

You've just explored the essential framework for building a scholarship program that is not only efficient but also truly impactful for students. From rethinking your application process to building lasting relationships with donors and alumni, the key is to be intentional, transparent, and student-centered.

This playbook is just the beginning. If you're ready to move from ideas to action, let's talk. We can help you create a tailored plan to address your program's unique challenges, streamline your operations, and maximize your impact.

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