Scholarship Administrators Meeting - Minutes

June 6, 2018

Introductions

Office of Student Finance (OSF) Item Type Project – Dianne Danov
- Dianne is undertaking a project to review and possibly change the names of the many scholarship item types in PeopleSoft for consistency across all departments.
- Dianne provided a demo of differences, similarities, confusion causing situations to support this project, etc.
- A Best Practices for Naming Scholarships in STAR document has been created to provide guidance. A copy of this document is following these minutes and will be posted to the ASR Scholarship Administrators page for reference.

Star Enhancements to Performance Reports – Renee Jackson and Peter Dahl
- As requested by users, enhancements have been made; a demo was given. Enhancements included:
  o The ability for the user to perform maintenance/updates to spending plans directly within the report in real-time.
  o Real-time updating of the report after spending plans are updated.
  o The look and feel of the report.
  o The ability to sort by many columns in the report.
  o The new functionality was available to end-users on May 14, 2018.
- Questions about the new functionality can be directed by email to asrstar@umn.edu.

STAR training
- New format is coming.
- Mary O’Brien from the Foundation will come to the next meeting to provide training updates.
- Video clips will be used in place of personal training sessions, which will be discontinued.

Admissions Update – Jenny Malek
- Admissions has received 40,000 applications for the 2018-2019 AY.
- Have sent out scholarship offers to 9000 incoming freshmen.
  o Strong academic class and diverse geographical locations.
  o Anticipate an incoming class of 5900.
- Challenge was the increase to non-resident tuition.
- Change for fall 2019: Applicants can self-report their own GPA; no longer need to wait for high school to report.
- Reminder: National Scholarship is a flat amount of $10,000 or $5,000 for Fall/Sprint for students admitted 2017-2018 or later (previously was the full difference between resident and non-resident tuition).
- There are currently three different Cohorts, each with a different set of tuition rates.
- Jenny shared examples of letters that are being sent to students
- Currently in the process of re-awarding scholarships to continuing students.
- Fall census date is September 18, 2018.

Financial Aid Update – Michelle Curtis and Nate Rosckes
- Reminder to have scholarships uploaded by 6/29 so Financial Aid Award Notices are accurate in July when provided to students.
- Summer 2018 scholarships have all been processed and disbursed for those already on student accounts.
- Only ones not yet disbursed to students are either SAP or have no summer registration.
- Should no longer be making any uploads for spring 2018 term; term has ended. Contact OSF Scholarship Unit if you have an exception.
- Disbursement to student accounts are being made nightly.
Board of Regents Expectations
- Anticipate a 2% increase in tuition for residents.
- Budgets are being prepared with an increase of 2%.
- 15% increase in tuition for new incoming nonresidents.
- Cost of Attendance can be found at: http://onestop.umn.edu/financies/cost-attendance
- Following is a clip from the page:

<table>
<thead>
<tr>
<th>Resident status</th>
<th>Tuition/fees</th>
<th>Books/supplies</th>
<th>Room/board</th>
<th>Transportation</th>
<th>Personal/misc.</th>
<th>Loan fees</th>
<th>Fall+spring total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident living with parent</td>
<td>$14,760.00</td>
<td>$1000.00</td>
<td>$3880.00</td>
<td>$228.00</td>
<td>$2000.00</td>
<td>$208.00</td>
<td>$21,364.00</td>
</tr>
<tr>
<td>Resident living in dorm or apartment</td>
<td>$14,760.00</td>
<td>$1000.00</td>
<td>$930.00</td>
<td>$228.00</td>
<td>$2000.00</td>
<td>$208.00</td>
<td>$21,106.00</td>
</tr>
<tr>
<td>Nonresident (class of 2022)</td>
<td>$30,438.00</td>
<td>$1000.00</td>
<td>$930.00</td>
<td>$1728.00</td>
<td>$2000.00</td>
<td>$208.00</td>
<td>$45,284.00</td>
</tr>
<tr>
<td>Nonresident (class of 2021)</td>
<td>$28,060.00</td>
<td>$1000.00</td>
<td>$930.00</td>
<td>$1728.00</td>
<td>$2000.00</td>
<td>$208.00</td>
<td>$42,912.00</td>
</tr>
<tr>
<td>Nonresident (class of 2020 and prior)</td>
<td>$25,960.00</td>
<td>$1000.00</td>
<td>$930.00</td>
<td>$1728.00</td>
<td>$2000.00</td>
<td>$208.00</td>
<td>$40,808.00</td>
</tr>
</tbody>
</table>

- There is ongoing discussion to possibly approaching the Board of Regents and requesting they project increases earlier in the year.

Scholarship Update – Michelle Curtis
Privacy of Personal Data
- Students are asked to sign a Student Financial Obligation and Responsibilities Agreement when they enter the U of MN. We believe this covers all facets as it relates to scholarship privacy issues.
- Section 8.0 agrees to releasing information to scholarship donors unless signee specifically revokes permission to do so.
  - Have never had anyone revoke permission
- Link to the E-Business Agreement is on One Stop website: https://onestop.umn.edu/terms-and-conditions/student-financial-obligations-and-responsibilities-agreement
- Concerns of identity theft have led to some talk allowing a student to possibly opt out

Sharing Information with Scholarship Donors – Marcy Joseph, University Foundation
- Has updated the privacy document that discerns what can be shared with a donor. In the yellow section where it previously said that EFAAN allowed for sharing actual award amounts but UMF discouraged it, it was changed to simply "We discourage sharing this." Seemed more sensible with the shifting gov't guidelines recently. The document follows the minutes.

Audit of Best Practices for Scholarships
- Michelle and Nate met with the internal auditors surrounding practices across all departments.
- An abbreviated report follows these minutes; a much larger report will be shared with departments when completed.

Other
- Last year at this time, Michelle had asked for suggestions for improvements. Thank you for your comments; she will share information in the coming months.

Next Meeting
- Scheduled for August 1, 2018 @ 1:00 pm in Walter Library, Room 101
Best Practices for Naming Scholarships in STAR

OSF project for Item Types related to scholarships in PeopleSoft.

Working Document as of 6/6/18: Details on how to set up a new Scholarship Item Type

Created by Dianne Danov

Background:
Currently there are over 18,000 scholarship Item Types set up in PeopleSoft. Because of the large number of Item Types, we are currently reviewing the Item Types awarded in 2017-2018, assuming they will be used again in 2018-2019. Note: if you have Item Types that were not used in 2017-18 and you will use them in 2018-19, I can review and update those as needed.

Guidelines for naming scholarship Item Types in PeopleSoft

- Review both the MOA and any revised MOAs in STAR for the official name of the scholarship fund as it was created.

- Make sure the correct name is being used for the scholarship.
  - In checking STAR I have found the donor has requested an updated name to the scholarship but the name had not been updated in PS.
  - Found the name of the donor was cut off, because of the character limit. Ex: last name of donor only had the first 2 letters because the first names of both donors were used and it went over 30 characters.

- If the scholarship Item Type name is entered incorrectly, just contact OSF Dianne Danov (d-dano@umn.edu) right now as I am working on this project. You can also contact Bob Balfour (b-balfo003@umn.edu) and let him know the correct name and he can update it.

- Changes made to the Item Type name are reflected on the Student’s Financial Aid Award Notice, the student account and on MyU portal. It is updated in the history panels of Peoplesoft so prior years are also updated on the student side. Note: the Item Type name, as it was awarded, will appear in STAR. If a change is made after the scholarship was awarded the name, change will not be reflected in the STAR recipient list.
Naming Convention

- Only 30 characters are available for the scholarship Item Type name

- Each space counts as one character

- Use Scholarship, Fellowship, Award in the name – something descriptive (Ex. use David Wong Scholarship instead of just David Wong)

- Check spelling of donor’s names – found scholarships with incorrectly spelled name, Ex - Jenine name is Jeannine.

- Identify the donor’s first and last name, if not enough characters, use the first initial of the donor’s first names (Ex. W & R Pennington Scholarship instead of William & Rosemary Pennington Scholarship)

- If you need the character space you can eliminate the spaces between the “&”. That saves two characters and looks fine in PeopleSoft because of the way the spacing is in the system - Bill&Susan Smith Scholarship. Contact Dianne or Bob.

- PeopleSoft will not accept a period or other special characters in the Item Type name, in Scholarship Automation. When trying to save in PeopleSoft, you will get an error message so you will need to remove it or contact Dianne or Bob and we will determine if we can do it manually.

- Capitalize the first letter of each word in the Item Type name.

- Do not use all capital letters when creating a Scholarship Item Type. Use Class of 1946 Scholarship, instead of CLASS OF 1946 SCHOLARSHIP.

- Use “Schol” if there is not enough spaces for the full word “Scholarship” in the Item Type name.

- SUMMER SCHOLARSHIPS
  - A separate dedicated Item Type is required for processing summer scholarship PeopleSoft.
  - You can include the word “Summer or SS” in the Item Type name to differentiate from a fall/spring scholarship when using the same name.
    - Example: John Doe Scholarship and John Doe Scholarship Summer

- If you want to save character spaces use “&” instead of spelling out “and” let Dianne or Bob know and we can do that for you.
<table>
<thead>
<tr>
<th>Green light: This student information may be shared with the student’s scholarship donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Name</td>
</tr>
<tr>
<td>- Enrollment status (full-time, part-time, not enrolled)</td>
</tr>
<tr>
<td>- College and Major</td>
</tr>
<tr>
<td>- Advisor</td>
</tr>
<tr>
<td>- Class (freshman, sophomore, etc.)</td>
</tr>
<tr>
<td>- Academic honors and awards (Dean’s List, etc.)</td>
</tr>
<tr>
<td>- Degrees received</td>
</tr>
<tr>
<td>- Anything else in the public U of M directory (email address, etc.)</td>
</tr>
<tr>
<td>- Student I.D. photo (per e-business agreement, otherwise private)</td>
</tr>
<tr>
<td>- Other selected info from student record (hometown, minor, etc., per e-business agreement, otherwise private)</td>
</tr>
<tr>
<td>- Most bio or other details provided by student (but see yellow box below)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STOP: Even with the e-business agreement, we cannot release this information to donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Grades or GPA of a particular student</td>
</tr>
<tr>
<td>- Race or creed of a particular student</td>
</tr>
</tbody>
</table>

While we cannot ask students for any of the above information or disclose it from their records or other sources, students may voluntarily choose to disclose this information to their donors.

See yellow box below for guidelines and best practices on the above and other situations that warrant extra caution and consideration.

<table>
<thead>
<tr>
<th>Best practices and guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Photos</strong></td>
</tr>
<tr>
<td>1. Request photo directly from student if possible</td>
</tr>
<tr>
<td>2. If none provided, use UCard photo</td>
</tr>
<tr>
<td>3. If UCard photo is bad, insert “photo not available.” Using photos from social media is strongly discouraged</td>
</tr>
</tbody>
</table>

When asking students for information, tell them:

- **who their information will be shared with:** donors, donor’s representative [**NOTE:** this document applies to 1-1 student/donor communications and does not cover events, publications, or other more public sharing of information]
- **how it may be shared:** in print or electronically, |
- **what you may do:** edit their responses for grammar, spelling, space, and privacy

All email to and from students needs to be through a umn.edu address

Add footnote to donor reports- suggested language:

*Please note, the student information in this report is not public information. In accordance with the Family Educational Rights and Privacy Act, it may not be reproduced or shared, either in print or online, without written permission from the student(s).*

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**Exceptions and Cautions – please contact UMF Central Stewardship Services if you have questions**

We cannot ask for the following, but if students self-disclose for their donor(s):

- **grades, GPA, race, or creed:** present as direct quote from student or do not use

- **health information (physical or mental) about themselves or a family member:** general best practice is to **err on the side of caution** and rephrase the reference to the specific condition (e.g. bipolar disorder, cancer, multiple sclerosis) to something unspecific but equally impactful **OR** remove the specific identifier: for example, “After I was diagnosed with depression, I decided to…” could become “After I was diagnosed with [a serious illness], I decided to…” **AND** “After my mother’s terrifying cancer diagnosis and treatment, there was no money left for college,” could become “After our family went through a terrifying cancer diagnosis and treatment, there was no money left for college.” However, there may be exceptions from time to time based on the reporting situation; evaluate on a case by case basis and be sure to confirm in writing that the student understands how his or her information will be shared. Please contact UMF Central Stewardship Services if you have questions.

- **actual award amounts:** We discourage sharing this.

If you are preparing something for a publication or a public audience and personal or family health information is a component, the student and/or family member referenced must sign a release form. The forms, and more information about guidelines, are available from UMF Marketing and Communications.
Audit-Wide Findings

We judgmentally selected a mix of scholarships/fellowships for graduate and undergraduate students totaling 63 samples from a variety of Colleges/Departments system-wide, including the coordinate campuses of Crookston, Duluth, and Morris.

Our testing sample disclosed the following issues related to scholarship/fellowships documentation:

- 16 of 31 Unit/Department Scholarship/Fellowship Committees tested do not follow the University’s Retention Schedule as it relates to scholarship/fellowship documentation.

- 26 of 31 Unit/Department Scholarship/Fellowship Committees tested do not have their scholarship/fellowship processes and procedures documented.

- Only one Unit/Department tested has an official signed Award Letter with Terms/Conditions (Graduate School – Fellowships).

- 12 of 30 Unit/Department Scholarship/Fellowship Committees tested did not have evidence of ranking documented for the scholarship/fellowship tested.

- 2 of 29 Unit/Department Scholarship/Fellowship Committees tested only has one person making the determination of scholarships/fellowships, yet there is no approval or review process in place.

- 5 of 22 Unit/Department Committees tested do not have a definition of financial need which is a criteria of some scholarships/fellowships, nor are they using student’s FAFSA or STAR data.

- Fellowships are not presently in STAR, thus the process lacks consistency and clarity.

STUDENT SCHOLARSHIP RECORDS This series documents the application and award of scholarships to undergraduate and graduate students, and may contain committee records. Recommended retention: A: Awarded: 5 fiscal years after award. B: Not awarded: 1 year after application denied.

SCHOLARSHIP FILES This series documents scholarships awarded by units, colleges and departments. This series may include but is not limited to applications, documentation of financial need when applicable, names of selection committee, notes of selection committee members, selection criteria, and award documentation. Recommended retention: 3 years after scholarship awarded. Prior to destruction, offer to University Archives.
Leadership should remind all employees involved with scholarship upload process to enter scholarship’s before the Financial Aid deadlines. By meeting these deadlines, departmental awards are included in the student’s total financial aid package and will disburse with all other assistance the student receives each term. This helps students determine how much they may need to borrow and/or pay when the first student billing cycle is generated.

Leadership should encourage unit/department scholarship committees to document meeting notes (e.g. noting members present, the date, and that scholarships were discussed and approved, etc.).

Units/Departments/Scholarship Committees should create a separate application to be used for scholarships, if needed.

Leadership should encourage unit/department scholarship committees to redact pertinent applicant information during the selection process in order to aid in objective decision making.

Unit/Department Scholarship Committees should work with the donors and OCG to update MOUs as needed.

Unit/Department Scholarship Committees should work to make the application process entirely digital. This includes, but is not limited to, not accepting physical applications.

Unit/Department Scholarship Committees should ensure they are using the latest systems provided by the University, such as Canvas instead of Moodle.

In cases where scholarships/fellowships are used for recruitment purposes, Unit/Department Scholarship Committees should create a process in which all dollar values assigned to students are reviewed. A process for how determining the dollar value each student receives should also be created.

Department/Units should maintain all scholarship documents together in a single storage space (preferably digital).

Committees should incorporate a ranking rubric to consistently score each applicant.