Scholarship Solutions:

A Guide for Faculty, Staff & Administrators
Serving on Scholarship Selection Committees
Using Scholarship Manager

Training & Management by:

Missouri State University Foundation

Missouri State Office of Student Financial Aid

2024—2025 Selection Cycle Edition

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Welcome

Our unique public affairs mission at Missouri State University is to develop educated persons and prepare them not just to get a job that pays the bills, but to gain the skills to have a positive impact on the world around them.

Hundreds of donors—made up of alumni, friends, family, faculty, and staff — have exemplified that mission through their contributions to student scholarships at Missouri State. Their efforts help facilitate future generations achieving their education and career dreams and help build a legacy of giving.

As faculty and staff, one of our chief duties is to find ways to meet the needs of students to help them attain their education. Increasingly, financial assistance is necessary for that journey. As such, donor-established scholarships are becoming ever more essential.

To best steward these donor-established scholarship funds, to most effectively and efficiently distribute those funds to the most qualified and deserving students, and to improve the scholarship awarding process, the University implemented the Scholarship Manager system in 2010. This system, besides updating and improving student application and awarding, has made the scholarship process more accurate— allowing all applications to be submitted electronically, automatically flagging eligible students, helping rank qualified students, and assisting in the tracking of funds.

This instructional manual should help you tackle and fully comprehend the Scholarship Manager as you use it to find top candidates for scholarships within your committee, not only in this selection cycle, but in future cycles as well.

Your time and help serving on a scholarship committee is very much appreciated, and we encourage you to contact us with any comments, questions, or suggestions. Together we can help countless students that might not otherwise be able to follow their passion and find their place.

Kelsey Menefee

Director of Donor Relations and Special Events

Missouri State University Foundation

The Basics

Scholarship Contacts

Thank you for participating on a scholarship selection committee for scholarships being awarded in Academic Year 2024 - 2025. We know it can be an overwhelming process, and we want you to feel comfortable in your scholarship decision making role. This booklet will assist you as you work with the Foundation, Financial Services and Financial Aid to ensure all Foundation scholarships are awarded accurately. In addition, please know that there are several people on campus who are ready to help whenever needed. If you have a question regarding a Foundation scholarship, the individuals below should be the first people you contact.

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Scholarship Participant Roles

To give you a broad overview of all participant roles - as well as the important role *you* play in the scholarship process, please review the following chart.

Donor	Foundation	Financial Aid	Committees	Students
• Contribute	• Solicit Gifts	• Interpret Agreements	• Promote Scholarships	• Apply Honestly
• Provide Instructions for Awarding (Donor Agreement)	• Advise Donors	• Enforce Agreements	• Review Applications	• Thank Donor
	• Manage Awarding	• Disperse Awards	• Nominate Recipients	• Maintain Requirements
	• Enforce Agreements			
	• Maintain Good Relations			

Awarding Checklist for 2024—2025 Scholarships

Checklist	Date
_____ Review each Donor Agreement to ensure awarding based on donor wishes. • Full agreements given to Deans and Department Heads. • Condensed versions available on Scholarship Manager.	Fall & Winter
_____ Application Opens online on for awards for 2024 – 2025.	November 1
_____ Scholarship Committee Training. • Online training available on the Foundation Scholarship Committee Member Training website.	February—March
_____ Available Fund Balances for 2024 – 2025 Awarding Uploaded.	By February 15
_____ Application Closes.	April 1
_____ Applicant Review Can Begin. • Foundation will notify all Chairs once all Banner data has been uploaded	April 8/May 1
_____ Complete Scholarship Renewals First. • System provides automatic renewals to be confirmed. • Ineligible or graduated students already removed	After April 8/May 1
_____ Request Financial Need Report for Eligible Candidates for All Need-Based Scholarships • Request list as needed from Foundation Scholarship Coordinator, Kelsey Menefee, who will be in contact with the Office of Student Financial Aid • Need reports will be returned within 5 business days.	By May 24
_____ Make All Scholarship Selections and Notify Foundation Once Complete. (Typically Selected in March or April; We Encourage Early Selection.) • Once notified, Foundation will pull your awards and submit to OSFA for approval.	By June 1
_____ Upon Financial Aid Approval and Needed Award Changes by the Committee, Foundation Will Get Approval from Chair to Send Student Notification Letters. • Notifications can be sent immediately or delayed until a specific date. • Notifications Letters include scholarship details, credit hour requirements, renewal requirements, and thank you letter instructions.	April—June

Scholarship Awarding Timeline

Scholarship Manager will be available for students to apply beginning November 1st, 2023. The absolute Application Deadline for students is April 1st, 2024. This lengthened application window was a decision made by the University administration in response to the Free Application for Federal Student Aid (FAFSA) priority deadline extension, the MSU Foundation Annual Scholarship Application deadline has been extended from March 1 to April 1.

Because a student's financial need is determined by the FAFSA, this extension ensures that students have the opportunity to be considered for need-based scholarships. It is also our hope that the additional month will result in a greater number of application submissions.

Financial Aid begins packaging students for aid for the following fall beginning in late March to early April. Because the resources available to students (i.e. scholarships, grants, etc.) impact the amounts and types of aid for which a student is eligible, and because the student's aid may not exceed their total cost of attendance, **it is VERY important that Financial Aid knows about your scholarship selections as soon as possible**. Awarding scholarships in March – April for the following academic year is ideal, with the cut-off deadline for committee selection being in mid-May.

Types of Scholarships

When a donor decides to establish a scholarship with the Missouri State University Foundation, they will decide whether to establish an endowed account (which will earn interest) or a restricted account (which will not). The minimum required amount to establish an endowed account is currently $25,000. When an endowed account is created, the monthly interest earned is automatically deposited into a restricted account. Every endowed account will have a corresponding restricted account, but many restricted accounts do not have a corresponding endowed account. Scholarship disbursements may only be made from restricted accounts.

When a donor has decided what type of account to create, the Foundation will guide the donor in the establishment of the rules governing the new scholarship. These rules are put in writing and compiled in a document known as the Donor Agreement. The final draft of the Donor Agreement is signed by both the donor and representatives of the University, and constitutes a legally binding contract. **As a scholarship decision maker and a representative of the University, you are bound by the contract signed by the donor and must uphold donors' wishes faithfully and precisely in your scholarship selection.**

How Do I Know How Much is Available to Award

You may check for account balances on Scholarship Manager any time after February 15th of each year (though fund balances could be available as early as the end of first week in February). At that time on Scholarship Manager, each scholarship will display the total funds available in a scholarship's corresponding restricted account. However, based on donor awarding specifications, some or all of these funds may or may not be available for awarding. Donors have the ability to specify the number of scholarships to be awarded and the value of each scholarship. For scholarships with no such specification the set number of scholarships available to award will automatically default to 999 and the committee has the option to award the full amount available.

For questions on account balances please contact Kelsey Menefee, Director of Donor Relations and Foundation Scholarship Coordinator.

What is Meant by "Financial Need"?

The University has determined that "with regards to financial need" means, unequivocally, that the student must have documented financial need through a submitted FAFSA. Every college student in the United States is encouraged to complete the FAFSA each year to be considered for available financial aid, and it is a fairly simple process to complete the online application. The Missouri priority deadline to file the FAFSA is April 1 (for the following academic year – fall, spring, summer), but a student may complete a FAFSA at any point.

The FAFSA considers all the financial resources available to each family individually. The FAFSA processor applies a consistent formula to each application to determine a dollar amount the family can contribute toward each applicant's education each year. Scholarship Manager will assist in allowing you to know which students' student aid index don't exceed the cost of attendance. This is a strong indicator of financial need but doesn't confirm need. All students recommended for need-based scholarships will have need individually confirmed by Financial Aid.

Thank You Letter Procedures

The scholarship thank you letter process is incorporated into the Scholarship Manager software. With this shift, students will be notified they have been selected to receive a scholarship via email and will enter Scholarship Manager to review which scholarships and how much they have received, as well as instructions and requirements on accepting those scholarships. Students will be required to submit their thank you letter(s) online through Scholarship Manger.

This means that no committee, department, or college is responsible for any part of the thank you letter process.

The Foundation Scholarship Coordinator will handle the collection and reporting of all scholarship thank you letters.

1. Following approval of award selections by Financial Aid, the Scholarship Coordinator will seek approval from the Committee Chair to send student scholarship notifications.
2. Scholarship Coordinator will send email notification to scholarship recipients, which will direct students online to review scholarship details and instructions on accepting awards and writing thank you letters.
3. Students will be instructed to submit electronic copies of their thank you letter(s) to Scholarship Manager.
4. Scholarship Coordinator will notify Financial Aid via email when thank you letters are received from students to clear their scholarships for dispersal in the fall.
5. Thank you letters will be individually reviewed by Scholarship Coordinator and then sent to the corresponding donor and/or contact by Stephanie Smith, Senior Director of Donor Relations and Special Events.
6. Electronic copies of all the letters will be saved and stored at the Foundation.
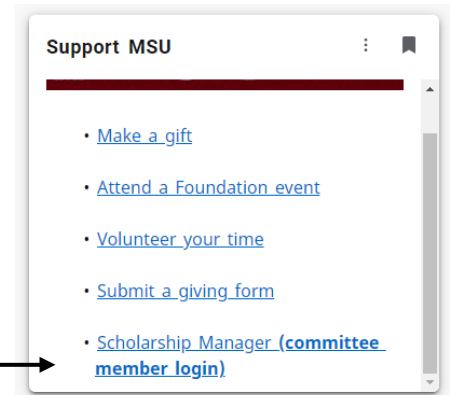
Committee Members

Logging on to Scholarship Manager

Step 1: Log-In to My.MissouriState.edu Using Your BearPass.

Step 2: Find the Support MSU Card.

Step 3: Scroll Down and Select Scholarship Manager (committee

member login).

Step 4: You Will Be Automatically Logged Into Scholarship Manager.

Support MSU

- Make a gift
- Attend a Foundation event
- Volunteer your time
- Submit a giving form
- Scholarship Manager **(committee member login)**

If at any point Scholarship Manager requests a username or password, close out of all your internet browser windows, and log back in through My.MissouriState.edu

Missouri State

Academic Year 2019-2020

🏠 My Committees   Help | Logout

Your session will expire in: 40:15

Training Tips:

The **Session Timer** is at the top of each page. Every page times out after 45 minutes, so if you plan to work on a page for longer than that, be sure and save your work prior to the 45-minute mark. This will save what you have done and restart the 45-minute timer.

That's It—simple! The rest of this manual covers the ins-and-outs of working Scholarship Manager, and much of it will be taught during training. If you have any questions throughout your time using Scholarship Manager, don't hesitate to contact the Foundation Scholarship Coordinator at 417-836-4143.

My Committees

Once you have logged into Scholarship Manager through the My.MissouriState Portal, you will land on the My Committee Page, which will provide you access to your committees.

- **Academic Year -** One of the cool features in Scholarship Manager is multi-year functionality, which will carry over data year to year. The new functions will assist with determining renewability; recipients of automatically renewable scholarships will be carried over to the scholarship for the next year for renewal. This feature will also block previous year recipients from receiving a non-renewable scholarship.

- **Committees -** Every committee you have access to will be featured as a link in blue. By clicking on the blue link for a particular committee you can enter that committee's page within the system and begin the review of scholarships assigned to the committee, eligible applicants for each scholarship, and start awarding.

- **Start Date -** This feature now displays the start date for scholarship selections. Committees will not be able to access their fully populated candidate pools until that date.

- **Due Date -** This feature displays the deadline for all scholarship selections. After that deadline all committee access will be blocked and extended access will only be granted on a case-by-case basis upon request to the Foundation Scholarship Coordinator.

Committee Scholarship Pages

By clicking on any individual committee on the My Committees page you will be linked to a summary page for the scholarships assigned to that committee.

A Test Committee - Financial Aid Committee

My Committees > Committee Funds

Funds

Awarding Open	Fund	Candidates	Last Matched	Pending Renewals	Awarded	Awarded $	Available $	Modify Awards
✓	MSU Completed Applications	0	Not Matched	N/A	0	$0.00	$0.00	N/A
✓	MSU Spring Training Test Scholarship	1	Not Matched	1	0	$0.00	$1,500.00	N/A

1. **Fund** – Lists each scholarship within a committee. By clicking on a scholarship, you will link to a page with a detailed summary of the scholarship, including information on each eligible candidate.
2. **Candidates** – This indicates the number of candidates out of the entire scholarship pool that are eligible for a scholarship based on its donor-defined requirements.
3. **Last Matched** – This indicates whether or not a committee member has eligible candidates yet to be reviewed for a scholarship. Following the Application Deadline of April 1, the Foundation Scholarship Coordinator will "match" eligible candidates for each scholarship and then notify the committee once matching is complete. *The Committee Chair no longer will need to perform this action.*
4. **Pending Renewals –** This indicates if the scholarship has any renewals from the previous year that need to be confirmed or revoked. Any renewals should be resolved before selecting new recipients. This is a task for the Committee Chair.
5. **Awarded** - This area indicates the number of students selected to receive a scholarship.
6. **Awarded $** - This area indicates how much of the total funds available within a scholarship have been awarded already for the coming Academic Year.
7. **Available $** - This area indicates the amount of funding available in a scholarship's restricted account for awarding. The amount of this fund will decrease as students are selected for awards.
8. **Modify Awards** – This area is for chairs and administrative access only. It tracks any changes that have taken place regarding those specific scholarships.

> *Training Tips:*
>
> The **Balance** for each scholarship will be uploaded in February of every year. Balances may also be altered manually by the Foundation if funds are contributed between February and May. Notably, committees may be limited on what they can award out of a fund, despite what is available, based on donor stipulations.

Scholarship Review Page
Scholarship Basics

By clicking on any individual scholarship within the Scholarship Committee Page, you will be directed to that individual scholarship's page, including information on its eligible candidates. The Description Tab features information on the requirements a student must meet in order to be selected to receive a scholarship, as well as specifications regarding the size and number of awards, and the criteria a student must meet to renew a scholarship when applicable.

- **Scholarship Description** – provides a synopsis of the donor-defined requirements a student must meet to be considered for a scholarship, including renewal requirements.
- **Fund Amount** – The total amount available within a scholarship's restricted fund.
- **Minimum Award** – the smallest possible award value a committee will be allowed to give from a fund.
- **Maximum Award** – The largest possible award value a committee will be allowed to give from a fund.
- **Maximum Recipients** – The number of scholarships that can be awarded. The system will default to 999, if not donor-specified to allow flexibility in awarding.
- **Hard Requirements** – Displays the requirements that a student <u>must</u> meet to be pulled in the eligibility pool for a scholarship.
- **Soft Requirements** – Displays the requirements, as specified in the donor agreement, that a student <u>can</u> meet to receive preference for a scholarship over another student. Students need not meet these requirements, but if they do meet these requirements the system will allot them "bonus points", which committees <u>must</u> take into consideration when awarding of a scholarship.

MSU Spring Training Test Scholarship
My Committees > Committee Funds > Review Candidates

| Description | Candidates | 1 | Renewables | 1 | Awarded | 0 | Reporting |

MSU Spring Training Test Scholarship

🔗 Requirement Information

This scholarship is for testing and training purposes only. Up to three scholarships will be awarded annually to undergraduate students, with scholarships being no larger than $1000 and no smaller than $500. Students must be planning to Study Abroad and have a GPA of at least 3.0 in their major or department. In addition, preference will be given to Glendale High School Graduates, with secondary preference going to students that have graduated from Parkview High School or West Plains High School. The scholarship may be automatically renewed as long as funds allow, with a student receiving the scholarship no more than 4 years.

Guidelines
It is the committee's responsibility to verify departmental GPA.

Fund Amount
$2,500.00

Minimum Applicant Award
$500.00

Maximum Applicant Award
$1,000.00

Maximum Recipients
3

Hard Requirements
  Common Requirements
  1. **Application Completed** is submi...
     The 2024 - 2025 Missouri Stat...
  2. **Education Abroad Plans** = Yes
  3. **IMPORT ONLY** = Yes
  4. **Student Type** is
     A) Incoming Freshman (freshman starting at MSU for the 1st time)
     OR B) Freshman (current MSU students that will start academic year with less than 30 credits completed)
     OR C) Sophomore
     OR D) Junior
     OR E) Senior

Soft Requirements

  Points: 10
  Missouri High School Attended is Glendale High School - Springfield

  Points: 8
  Missouri High School Attended is West Plains High School - West Plains

  Points: 8
  Missouri High School Attended is Parkview High School - Springfield

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Training Tips:

Donors usually want the Minimum or Maximum Award amount awarded, not a value in-between. In addition, if a Maximum Recipient number is specified, committees should award that full number of scholarships. If no amount is specified for these fields, it is up to the committee's discretion. If you have questions, contact the Foundation Scholarship Coordinator.

Candidate Review

Committee members will likely spend the most time in the Candidates Tab. This will display information regarding the fund's balances, as well as the candidate pool.

- **Search By Last Name** – Type their name and press Search and the eligible candidate list will be narrowed. Press Reset to go back to the full candidate list.
- **PDF** – Press this symbol to download a student's full application in that format rather than reviewing particular fields within the system.
- **Student Name** – Click on a candidate's name to view an online version of their application and to leave ranking and comments for others in your committee to see.
- **Current Awards** – Displays the sum of all other donor-funded scholarships that student has been selected for in the upcoming academic year. To view details of other awards, hover over the amount.

> **Training Tips:**
> Committees should always review Soft Match and corresponding criteria within Student Information Options to ensure donors' wishes are met. If a scholarship has a preference and a student meets that criteria they should be selected over others.

There are other functions available if you click the Candidate Actions button.

- **Set Display Preferences** – We will discuss this in detail on the next page.
- **Export Data** – The eligible candidate list can expand to include any relevant info your committee may want to review from each application. If you would like to review this data in an Excel spreadsheet press this button.
- **Evaluation Options** – The evaluation options will allow you to see rankings and comments made by yourself on eligible candidates.
- **Candidate Options** – These options will only be made available to Chairs. The Chairs will be able to identify why a candidate isn't eligible, import qualified candidates, and remove selected candidates.

Candidate Data Display Preferences

It is likely that, as you review eligible candidates, you will want information beyond a student's name and other donor-funded scholarships for which they have already been selected for the upcoming year.

You can expand your candidate data grid to include any relevant criteria from the student's application. By placing these fields in the grid, you can easily review information and compare candidates.
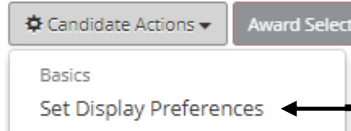
- **Set Display Preferences** – Pressing this option under Candidate Actions will expand a list of all questions relevant to your committee within the application.

Show?	Sort 1	Sort 2	Field	Description
SHOW	○↑○↓	○↑○↓	4-H	Indicates if student has been involved in 4-H.
SHOW	○↑○↓	○↑○↓	Accounting Club / IMA Student Chapter	Indicates students involvement in Accounting Club / IMA Student Chapter.
SHOW			Accounting Courses	Accounting courses the applicant has already taken or in which they are currently enrolled.
SHOW	○↑○↓	○↑○↓	Ad Club / Ad Team	Indicates if student is a member of Ad Team or Advertising Club.

1. **Show?** – Selecting a box in this column will add the corresponding field to your candidate data grid.
2. **Sort 1 & Sort 2** – Selecting either the up or down arrow in these columns will allow you to sort the candidates in your candidate data grid by varying categories on a Primary and a Secondary Sort.
   a. ▲ **Ascending** – Used to sort criteria alphabetically.
   b. ▼ **Descending** – Used to sort criteria numerically (starting with the largest number).
3. **Field** – Name of fields from the application to add to the candidate data grid (listed aplhabetically).
4. **Description** – Provides description of the field.

Save Preferences & Refresh Results – Found at the bottom of the Candidate Data Display Preferences box. Click to add your desired fields and sorts to your candidate data grid.

> **Training Tips:**
> All fields pulled from Banner, such as GPA, major, minor, credit hours, etc., can be found at the bottom of the list beginning with **Z_**.

Candidate Data Display Preferences

All committee members will have access to three major category groupings within the display preference options. These varying categories will serve different purposes as you review candidate information, make decisions on candidates, and determine your candidates for awarding.

(1)

Show Matching Details				
Show?	Sort 1	Sort 2	Field	Description
☑			Matching Details	Provides complete details about matching results for each candidate.

(2)

Evaluation Options - READ ONLY				
Show?	Sort 1	Sort 2	Field	Description
☑	Up / Down ○↑○↓	Up / Down ○↑○↓	Your overall ranking	Please provide an overall ranking of this candidate's fitness for this scholarship.
☑	Comment Box		Your comments on this candidate.	Please provide comments on this candidate.

(3)

Student Applications				
Show?	Sort 1	Sort 2	Field	Description
☐	Up / Down ○↑○↓	Up / Down ○↑○↓	Application Completed	"The 2024 - 2025 Missouri State University Foundation Annual Scholarship Application" Submit Date.

(4)

Candidate Data				
Show?	Sort 1	Sort 2	Field	Description
☐	Up / Down ○↑○↓	Up / Down ○↑○↓	4-H	Indicates if student has been involved in 4-H.

1. **Show Matching Details –** Selecting Matching Details will allow you to see all the hard and soft requirements of the scholarship and how the student's answers match up. You can see if they passed or failed each of the requirements and what their answers were.
2. **Evaluation Options** – Selecting items in this category will allow you to give a score to all eligible candidates based on a scholarship's criteria and the candidate's application. You also can leave comments on why you gave a ranking.
3. **Student Applications** – Selecting Application Completed will show you which candidates have and have not officially submitted the application. This option will not be necessary, as this is a requirement for all scholarship candidate pools.
4. **Candidate Data** – Selecting fields in this category will add responses for criterion on the application into your candidate data grid.

> *Training Tips:*
> Not all committees use the **Evaluation Options**. It is just a tool to assist with selection. Some committees opt to just have members narrow down their top few candidates and committees come to a consensus without submitting rankings or comments. It is up to the dynamics and functioning of each committee.

> *Training Tips:*
> Committees can review only criteria specifically stated for a scholarship or any criteria on the application as long as the candidate is in the eligibility pool. It is up to each committee. **We do encourage committees to determine key criteria they consider "most important" in selection to provide consistency in reviewing.**

Committee Chairpersons

Chairperson Responsibilities

As a scholarship Committee Chair, you will have greater responsibility than other members of the committee. Our offices give you complete freedom in how you manage the selection process for your committee(s), but most committees tend to prefer "ground rules" to follow.

Some key factors to consider while guiding your committee through the scholarship selection process...

- **Timeline** — Committees have until early to mid-May to make selections, but many committees opt to finalize and submit their selections earlier than that. You as the Chair should set the time window in which committee members should start to review, have all reviews completed, and the date on which the committee will make all selections.

- **Criteria Importance** — As long as a student meets all the basic criteria specified within a donor agreement, a scholarship committee has a great deal of freedom in determining the importance they place on the varying criteria. *Preferences outlined by donors should always take precedent*, but if a committee is evaluating 10 candidates that all meet the criteria, it is up to each committee to decide how they determine which candidates are selected for the awarding. Committee Chairs, with the input of their committee members, should determine the key criteria that their committee will look at to determine scholarship recipients. This ensures selection consistency.

- **Narrowing Your Candidate Pools** — Some committees may find themselves with an abundance of eligible candidates for scholarships that are incredibly broad. In such circumstances, it is beneficial for Committee Chairs, with the input of committee members, to set basic parameters committee members should follow to narrow the number of candidates they must review. For example, if a committee has a scholarship with 150 eligible candidates, the committee could opt to only review candidates with a cumulative GPA over 3.0 or only review candidates submitting a Personal Statement.

- **Selection** — The operation of each scholarship committee across campus varies widely. The way your committee selects scholarship recipients should be determined prior to candidate review.
    - **Decentralized Approach** — Some committees never actually meet in person. Each member reviews candidates, submits their rankings and comments in the system or their top choices directly to the Chair, and the Chair makes all final selections within the system.
    - **Centralized Approach** — Some committees meet in person to make selections. In such cases, members are instructed to review candidates prior to the meeting and narrow down their top few candidates for each scholarship. Upon meeting, each scholarship is discussed, with the group coming to a consensus on which candidates should receive which scholarships.

There is no correct way to operate a scholarship committee, but the Chair should determine how the committee will run prior to candidate review and scholarship selection.

Scholarship Renewal Features

One of the major new features within Scholarship Manager is the new Renewability Functions. **Automatically Renewable Scholarships** are programmed to recognize how many years they can be renewed. If a scholarship doesn't specify how many years of renewal are allowed, we default to 5 years for Undergraduate Awards and 3 years for Graduate Awards.

> **Training Tips:**
>
> Committee Chairs should try to complete scholarship renewals prior to their committees conducting scholarship review. This will knock some awards out early in the process and give committees a clearer picture of what they have and need to award.

Fund Review Page – Renewal Features

Within the **Fund Review Page,** you will find several tabs. Scholarships that are automatically renewable will have a **Renewables** tab. By selecting this tab, it will open to show a list of all candidates from the previous year that could be up for automatic renewal.

It will show the name of the candidate(s) up for renewal, how much they were awarded the previous year, and which installment they are on (1 of 4 years, 2 of 4 years, etc.).

Sometimes renewal is tied to a student maintaining criteria that are separate from the eligibility criteria. This renewal criteria will be noted in the **Description** tab, as well as the **Eligibility Details**. Please be sure to confirm the candidates' renewal eligibility before confirming. If there are any questions or doubts about a renewal, please contact the Foundation Scholarship Coordinator.

If a candidate doesn't meet the renewal criteria or a committee determines a renewal candidate is graduating, leaving, etc., the Chair can press **Revoke**. This will cancel the student's scholarship renewal for the coming year, and the Chair will be prompted to write a short explanation for the revocation for recording purposes.

> **Training Tips:**
>
> The Scholarship Coordinator will check on the graduation status of all renewal students with the Bursars Office in late February and remove any students that have officially graduated from renewal consideration. Committee chairs should verify if students plan to graduate in May. If they are, and are not still eligible as a graduate student, the committee chair should revoke the award.

If candidates are cleared for automatic renewal, the Chair can press **Confirm Installment(s)** or **Modify Installment(s)**. Both buttons will take the Chair to the same page to confirm or alter the award amount and to see what installment the student will be receiving in the coming year. The Chair can then press **Save Award Information** to submit the selection. This will prompt back to the Fund Review Page, the renewals will appear in the **Candidates** tab, and available awards and balances will be updated.

Chair Features for Review & Awarding

To create a more centralized process for selecting and altering awards, Committee Chairs are the only individuals with access to features that allow such actions.

Candidate Actions

Within Candidate Data – Candidate Actions, Chairs will have an additional option titled Show Chairperson Data. By adding the two fields in this category to their candidate data grid, Chairs can review comments left by each committee member and see average rankings for each candidate by the committee. The average and justifications should steer committees towards selection.
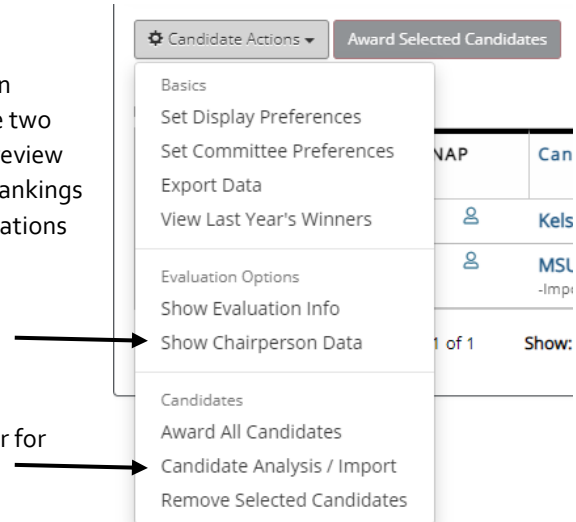
Available Candidates

Within the Available Candidates box, extra features will appear for Chairs allowing them to make awards and add and remove candidates from their candidate lists.

- **Award Selected Candidates** – By selecting a student in the Award column and pressing this button you will be prompted to an awards page to provide details for and finalize awarding.
- **Candidate Analysis/Import Candidates** – Often, committees will wonder why an applicant is not shown as a candidate. With this feature, committee chairs can search for an applicant to identify why they are not eligible. In some rare instances a committee may need to add a candidate to their candidate pool for a scholarship. This most frequently occurs for scholarships requiring auditions or the submission of portfolios. To add a candidate to your list, search for an applicant in the same way and you may import them. If you can't find a candidate, please contact the Scholarship Coordinator and they can have the student added to the database.
- **Remove Selected Candidates** – To "clear the clutter" of candidates that you will not award out of your committee members candidate data grids, select students in the Award column and press this to remove them from that scholarship.

IMPORT ALERT: Chairs *MUST* contact the Scholarship Coordinator prior to importing a candidate. The Coordinator must clear a candidate for Import or their award will be blocked by Financial Aid. Weekly reports are run to track this activity in the interests of transparency and financial accountability.

Scholarship Awarding Page

Once students have been selected for awarding Chairs will be prompted to the Scholarship Awarding Page.

Award Candidates - MSU Spring Training Test Scholarship

Review Candidates > Award Candidates

(1)

Help - Awarding Instructions
It is the committee's responsibility to verify departmental GPA.

(2)

Award Guidelines
New award(s) must total: $1,500.00 or less
📊 View Possible Award Amounts
Minimum Applicant Award: $500.00
Maximum Applicant Award: $1,000.00

(3)

Candidates Already Awarded
$0.00 of $2,500.00 awarded.
0 of 3 awarded.
Encumbered amount: $1,000.00

Training Tips:

Committee Chairs - don't be nervous to make awards! Students aren't aware of their selection until they are officially notified by the Scholarship Coordinator. Awards aren't final at this point. They can still be changed and altered. Once committees have submitted all their selections and notified the Scholarship Coordinator, Financial Aid reviews and approves awards. At that point the Scholarship Coordinator will confirm with the Chair that it is okay to notify the students. Once that approval is granted, students are notified. Until that point, committees can alter or tweak awards as desired.

Candidates (1)

🔍 Type to search

Candidate	Annual	Renewal Duration	
MSU Test	$ 1000	4 years ⌄	≡

(4)   **(5)**

Cancel   Save

1. **Awarding Instructions** – This is where specialized notes about specific scholarships can be found. For example, the awarding instructions above serve as a reminder that the committee must verify departmental GPA before awarding since that is a piece of data that cannot be brought into Scholarship Manager as a requirement.

2. **Awarding Guidelines** – This area will remind you how much is available for awarding, as well as minimum and maximum award amounts. If a Chair attempts to award scholarships outside of these parameters, they will receive an error message.

3. **Candidates Already Awarded** – Information pertaining to scholarship awards and renewals that have already been made can be found here. In addition, it will show the encumbered funds and number of candidates that can still be awarded.

4. **Candidates** – This field will show the candidates you have just selected to award. Chairs must submit an award amount.

5. **Renewal Duration** – For automatically renewable scholarships, Chairs are prompted to select how many years candidates will receive the scholarship. This should be based on years noted in the donor agreement (found in **Scholarship Description**) and the student's Expected Graduation. If the scholarship can be renewed after a recipient has graduated with their undergraduate degree and gone to pursue a graduate degree, please be sure to account for that in the renewal duration.

Once all this info has been entered, Chairs can press **Save** to submit their selection.

Scholarship Renewal Schedule

Scholarship renewal for automatically renewable scholarships can be a confusing and complex process. Generally, if a scholarship is set up to be automatically renewable, the donor specifies for how many years a student can automatically renew. If this is not specified, we default to a 5-year renewal schedule for Undergraduate Scholarships and a 3-year renewal schedule for Graduate Scholarships.

In addition, our offices always give students the benefit of the doubt for scholarship renewal, assuming that all undergraduates are on a 5-year plan and all graduate students are on a 3-year plan. However, if a student in their application indicates plans to graduate prior to this 5- or 3-year schedule, renewal years can be adjusted accordingly.

The chart below will assist Chairs as they try to determine how many years they should select a student to receive a scholarship.

Scholarship Renewal Schedule				
Student Type	**5-year Renewal**	**4-Year Renewal**	**3-Year Renewal**	**2-Year Renewal**
Graduate	3 years	3 years	3 years	2 years
Senior	2 years	2 years	2 years	2 years
Junior	3 years	3 years	3 years	2 years
Sophomore	4 years	4 years	3 years	2 years
Freshman	5 years	4 years	3 years	2 years

Candidates Already Awarded

Chairs will also have additional features that allow them to modify already selected awards and close scholarships out for a selection cycle once all award selection is complete for a particular fund. Most of these features are located in the **Awarded** tab of each fund.

- **Modify/Cancel Selected** – If you need to change or remove an award you have already made, select the student. You can then click **Cancel Selected** to fully withdraw a scholarship, or you can select students and click **Modify Selected** to change award amounts or the number of renewal years.
- **Close/Open Awarding** – Once you have completed all awarding for a scholarship for the cycle, press this button to close the scholarship for the year. This will signify that this particular fund is finished in its selection process back on the Committee Funds page. If it needs re-opened, the Chair can select the scholarship from this list (no other committee members will have access to it) prompting the Chair to its Scholarship Review Page. The **Close Awarding** button will now read **Open Awarding**. Press Open Awarding and the scholarship will re-open for continued activity.

By going back to the **Committee Funds** page, you will see all of your fund names, how many students who have selected to award for each, how much money is available and has been awarded for each, and whether or not the fund is open. Those with a check mark are still open and still need to be selected.

Funds

Open	Fund	Candidates	Last Matched	Awarded	Awarded $	Available $	Modify
✔	Child of Alum Test	464	7/13/2018	0	$0.00	$0.00	N/A
✔	MSU Completed Applications	51	7/19/2018	0	$0.00	$0.00	N/A
	MSU Spring Training Test Scholarship	543	N/A	1	$1,000.00	$1,500.00	Modify
✔	Rotary Club of Springfield	8	7/17/2018	0	$0.00	$0.00	N/A

Thank You

We want to sincerely thank you for your time and effort in serving on a scholarship selection committee and getting acquainted with the Scholarship Manager software for the Missouri State University—Springfield Campus. We recognize that your time is incredibly important, and we have tried to expedite the training process and make both the training and the system itself as hassle-free and non-intrusive as possible.

We recognize that Scholarship Manager for first-time or early users may appear complex and complicated. Hopefully this training has helped mastering the system seem less daunting and will hopefully help you and your scholarship committee, department and/or college through your scholarship selection cycle.

With that in mind, we want to let you know that the offices working to run this system and the donor-funded scholarship awarding process campus-wide always have their doors open for you if you ever have questions, concerns, comments, or suggestions. This software and the scholarship selection process is organic and evolving; we are always open to your feedback, which will help us make tweaks and changes to better fit the needs of this campus and our students, faculty, and staff.

Again, we thank you for your time and effort; without you this would not be possible. We have no doubt that with you on board, the scholarship experience at Missouri State can truly be exceptional. This system and your involvement help us be better stewards of our resources, increase accountability to constituents, and help better promote and award scholarships to the most deserving students.

Together we can help countless students that might not otherwise be able to follow their passion and find their place.

Kelsey Menefee

Director of Donor Relations and Special Events

Missouri State University Foundation