Report One: Key Activities, Accomplishments and Staff Excellence

I. Key Activities

- **Support Class Shaping and Enrollment Management Efforts**
  - The University Scholarship Office (USO) is tightly aligned with the Office of Admissions and Financial Aid Office in recruiting and marketing efforts. As such, the work related to this primary Key Activity includes data-driven decision making and working closely with both offices to ensure we are providing students with their best options for financing their degrees. This involves analyzing prior years’ awarding strategies and yields, and adjusting awarding strategies as necessary.

- **Provide Excellent Customer Service to Students and Campus Customers (departments)**
  - As the USO seeks to coordinate more and more of the scholarship processes on campus, one key element to achieving this will be ensuring departmental success. As such, providing excellent customer service to departments is a key activity for this office. Regularly communicating, providing training and support, and having dedicated departmental representatives for departments to contact are all activities contained in this area. Providing excellent customer service to our students is also a key activity for this office.

- **Student Campus Experience and Seamless Navigation**
  - While the USO is aligned closely with the Office of Admissions in the selection and awarding process for new students, we are equally aligned with Financial Aid and Income Accounting Offices in helping students navigate tuition billing and payment. Improving the delivery of services and processes between the three offices is a key activity in meeting the “seamless navigation” goal of Enrollment Management and Student Affairs.

- **Support and enhance educational opportunities for staff members, internally and externally**
  - Document all internal processes and procedures, and leverage team members’ strengths by assigning work that is fulfilling and challenging. Provide opportunities for professional education – including networking with peers at conferences, professional development courses offered by the U, etc. – and encourage staff members to participate in committees and other venues.

- **Goals:**
  Please list the goals related to your programs and services and any other contextual information that is useful.
  
  i. **Key Activity: Support Class Shaping and Enrollment Management Efforts**

  1. **Goal:** Select recipients and award both institutional and endowed funds (Freshman and Transfer, merit and need) in a way that strategically leverages scholarship dollars to support enrollment management goals.

  2. **Desired outcome:** By leveraging prior year data (specifically yield rates on acceptances and corresponding enrollment rates), increase the overall scholarship offers and acceptances to student groups targeted by Enrollment Management efforts.

  3. **How these outcomes have been achieved or modified:** We changed to a more data-driven selection model for the 15/16 scholarship rounds, based upon yield rates. A series of meetings occurred in late December of 2014/early January of 2015 to discuss and finalize this strategy. Several decisions were made in those meetings:
Based on data created by Mike Martineau (OBIA) for the Strategic Enrollment Initiative, it was decided that scholarship selection would abide by the Admissions Index, which weights GPA and test scores equally, rather than the Scholarships Index.

Freshmen Academic Achievement Award for Non-Residents (FAAAANR) was extended to all non-residents, not just those from specified states.

The Trustee’s award selection would be based not only on the exact ACT and GPA requirements, but also on the equitable Admissions Index.

A majority (approximately 80%) of the awards would be given to those applicants who met the December 1st Priority Application Deadline for Admissions (“round 1”), with a subsequent round held in reserve for those who met the February 1st Admissions Application deadline.

Admissions provided the data file, based upon criteria we had mutually discussed. They also told us directly which dates/time stamps to use and application status (“ACOMPL” with dates of 12/1 for the first round and 2/1 for the second).

It was also decided to use a data-driven approach to narrow down the pool of students for consideration for the Diversity scholarships.

The criteria considered for selection were students:
- Of diverse ethnic and cultural backgrounds
- With indicators of first generation (i.e. neither parent/family member receiving more than a high school education)

This narrowed the selection down to several hundred. Because the Diversity scholarships are also merit based, we then used the ACT/GPA/AI numbers to select the final awardees.

In addition, it was decided:
- The U Tradition & Heritage scholarship, which is a cash-based award, has in the past not been allowed to “stack” with other awards. We are allowing stacking this year.
- Diversity Achievement award ($2,000 / year for 1 year) will also be allowed to stack with other non-full awards (i.e. all awards except President’s and HAE).
- Similarly, it was decided that as the USO scholarships are now treated as cash awards, while it is a best practice (and recommended by the office) that University scholarship dollars be strategically leveraged to award the maximum amount of students, departments can, at their discretion, “stack” a departmental partial award (i.e. “T53”) with a partial USO scholarship. The example used was a $2k Trustees award with a departmental $2500/partial T53.

4. Data to support your outcomes:

- **Key Findings**: The below represents a summary of our awards given for the 15/16 Aid Year. As you can see by the data on the following page, we offered a significant amount of awards to incoming students this year, and increased the awarding numbers substantially over the 14/15 year.

1 See the associated Excel Spreadsheet, “Appendix A: 2015/2016 Scholarship Awarding Strategy”, which contains the bands of awards and total numbers given for both round 1 and round two awarding.

2 As approved via email correspondence with Mary Parker on 4/7/2015.

3 As approved in a meeting with Mary Parker on 4/2/2015.
### 2014/2015 Academic Year Freshmen Merit Scholarships

<table>
<thead>
<tr>
<th></th>
<th>Non-Resident</th>
<th>Resident</th>
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</thead>
<tbody>
<tr>
<td>Total Number Completed</td>
<td>~ 2,900</td>
<td>~ 5,000</td>
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<tr>
<td>Admissions Applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of scholarships offered</td>
<td>~ 1,100</td>
<td>~ 2,600</td>
</tr>
<tr>
<td>Mean GPA / ACT</td>
<td>3.75 / 29</td>
<td>3.8 / 28</td>
</tr>
<tr>
<td>Median GPA / ACT</td>
<td>3.8 / 29</td>
<td>3.9 / 28</td>
</tr>
<tr>
<td>Range</td>
<td>3.0-4.0 GPA / 19-36 ACT</td>
<td>2.85-4.0 GPA / 19-36 ACT</td>
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### 2015/2016 Academic Year Freshmen Merit Scholarships

<table>
<thead>
<tr>
<th></th>
<th>Non-Resident</th>
<th>Resident</th>
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<tbody>
<tr>
<td>Total Number Completed</td>
<td>~ 2,700</td>
<td>~ 4,700</td>
</tr>
<tr>
<td>Admissions Applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of scholarships offered</td>
<td>~ 1,600</td>
<td>~ 3,400</td>
</tr>
<tr>
<td>Mean GPA / ACT</td>
<td>3.74 / 28</td>
<td>3.84 / 28</td>
</tr>
<tr>
<td>Median GPA / ACT</td>
<td>3.82 / 28</td>
<td>3.91 / 27</td>
</tr>
<tr>
<td>% Increase in awards</td>
<td><strong>124%</strong></td>
<td><strong>131%</strong></td>
</tr>
<tr>
<td>from previous year</td>
<td></td>
<td></td>
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</tbody>
</table>
The increase in both Freshmen and Transfer awards translates into over $5.75 million dollars in increased scholarship awards going to the 2015/2016 incoming class; in order to understand the data, the yield rates of the scholarships must also be evaluated, and ultimately, we need to understand if this increased investment resulted in overall increased yield of the incoming class. Unfortunately, not all data is available at the time of this report to complete the analysis of how the scholarship awarding strategy may have impacted overall yield of the incoming class. As the data become available and are analyzed by OBIA, the report will be updated.

- **Actions taken:** In addition to the overall increases in awards as referenced above, we improved some internal processes, as well:
  i. Financial Aid and Scholarships Combined Award letter: for the first time, we created an award letter integrating a student’s financial aid and scholarships, and presented this information in a “total estimated aid
This letter allowed for students and families to have a more holistic picture of their aid package. These letters were mailed beginning the first week of April, and we saw 2-3% increases in scholarship acceptances immediately following each mailing.

ii. In addition to the increased dollar amounts, we were also able to award the Freshmen merit-based scholarships much earlier this year by using the data-driven selection approach. Scholarship offers were released for those students who met the Dec 1st Priority Admissions Date the final week of January 2015. This represents a significant acceleration, as in the past the awards have been held until all or most recipients were selected. By separating the merit-based awards from the need-based awarding process, we were able to get merit awards to students much earlier.

5. **Alignment**: This objective is directly aligned with the “Entering Class” dashboard metric for Enrollment Management. It is also aligned with the third strategic objective in the Student Affairs Strategic Plan, “3. Promote Diversity on campus through effective programming and active recruitment of staff and students; d. Increase resources available for underrepresented students (e.g. scholarships, grants, and jobs).”

6. **How these goals, outcomes and supporting data relate to retention and graduation of students**: The “Entering Class” dashboard metrics for Enrollment Management is obviously more geared toward the “front end” of the student lifecycle; however, many of these scholarships also have retention components as they are offered over multiple semesters. Working closely with the Office of Admissions to shape the class should also ultimately aid in retention and graduation, as we recruit students who are ultimately more likely to succeed.

ii. **Key Activity**: Provide Excellent Customer Service to Students and Campus Customers (departments)

1. **Goal**: There are several goals associated with this Key Activity:
   - Build solid relationships and improve departmental perception of central administration by providing excellent customer service by providing departments with trainings and communications to effectively utilize the new scholarship administration system.
   - Support departmental awarding of scholarships and strategic leveraging of scholarship dollars by providing access to information and best practices.
   - Provide excellent customer service to students by minimizing “bouncing” between offices (such as Financial Aid and Income Accounting).

2. **Desired outcome**: There should be multiple outcomes here:
   - Reported high levels of customer satisfaction in customer satisfaction surveys.
   - Scholarships personnel seen as experts across campus, and requested in strategic task forces or working groups.
   - Provide visibility to departments about which awards students are receiving, and provide central administration visibility into the total amounts of scholarships and fellowships awarded across campus.
   - Ultimately, the number of individual students receiving multiple “full ride” or large awards should diminish, and the total number of students receiving scholarships campus-wide should increase. We should also see the total dollar value of “unmet need” for students diminish over time.
   - The number of times we need to “bounce” a student between offices should diminish. In addition, the number of necessary interactions with students to
resolve an issue should diminish if each of our offices is able to provide more holistic answers.

3. **How these outcomes have been achieved or modified:** As last year was the baseline year for establishing the new scholarship procedures, there is no prior data to compare this year’s numbers to for some of desired outcomes. However, we do have data to understand perceptions of customer service satisfaction, as well as many anecdotes of anecdotally, we had many phone conversations with departments to help them understand the “stackability” (or lack thereof) of certain awards, which were now visible to the departments through Scholarship Admin.

One of the major learning outcomes from the implementation was confusion around stipends vs. scholarships – i.e. money that agencies, people, and businesses give to students to supplement living expenses while the students are in a learning experience vs. a gift of money given to students to support their academic careers. Education was needed in many departments across campus – from Athletics to Social Work, from the President’s Office to the College of Pharmacy – to assist them in defining experiential learning outcomes for students.

4. **Data to support your outcomes:**
   - **Key Findings:** Last year was the year for understanding the baseline, as it was the first full year with Scholarship Administration in place. Below are some of the key metrics captured by the system:

<table>
<thead>
<tr>
<th>Number of awards reported for students for the 2014/2015 Academic Year:</th>
<th>11,338*</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Note: the system counts each semester’s disbursement as an individual award; however, the student may have received the same “named” scholarship in both Fall and Spring semesters. So the actual number of “scholarships” may be closer to half of this number.</td>
<td></td>
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<table>
<thead>
<tr>
<th>$ Value of awards reported and disbursed</th>
<th>• Over $25 million was reported</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• $17.7 million actually disbursed to the students’ accounts in 2014/2015</td>
</tr>
</tbody>
</table>

*The difference is due to awards that are reported but cannot disburse to the tuition account, such as Traineeships, Travel Awards, gift cards, laptops purchased for students, etc.

| Number of departments who processed transactions: | 195 |

For the following data pertaining to departmental customer support, we pulled data from several sources. The first is tracking spreadsheets utilized during the training initiative. We also sent out a satisfaction survey to the departments during the first part of October. Those results are shown below.
Number of people initially identified for training: 186

Number of people ultimately trained: 465*

*Important lesson learned – it’s nearly impossible to identify who does what work on campus. Throughout implementation, we were constantly receiving inquiries from people learning about the new process/system/office via word-of-mouth from peers. We had originally planned 13 formal training sessions...and ended up giving 34!

Number of people with access to the system: 350

Department Survey – Scholarship Administration Implementation:

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of individuals who received the survey:</td>
<td>465</td>
</tr>
<tr>
<td>Number of respondents:</td>
<td>81, approx. 20%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed that they understood why the change in the scholarship process was necessary</td>
<td>95.06%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed that the training they received prepared them on how to use the system</td>
<td>83.95%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed that the Scholarship Office staff were available for support and consultation</td>
<td>88.82%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed that they were able to communicate the new process to students</td>
<td>69.14%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed that they received the information they needed about the new scholarship process</td>
<td>88.99%</td>
</tr>
<tr>
<td>% Of respondents who strongly agreed or agreed they received information they needed about the new scholarship process in a timely manner</td>
<td>81.48%</td>
</tr>
<tr>
<td>% Of respondents who contacted the Scholarship Office for assistance</td>
<td>87.65%</td>
</tr>
<tr>
<td>% Of respondents who were very satisfied or satisfied with the service they received</td>
<td>87.33%</td>
</tr>
</tbody>
</table>

*Note: of the respondents, 19.75% stated this question was not applicable or they were unable to judge.

Anecdotal comments from departments

- “I am a person who doesn’t like change, so at first I wondered how and why we had to begin a new process, I was not happy. After very helpful training and very helpful staff, I found this new way of offering and processing scholarship money much smoother than the previous way. It is much less painful and I really appreciate all the help I received from a very patient scholarship office”.
- “Perhaps you guys can teach some other service departments how to roll out changes?”
- “Tanner has been awesome! He has been prompt and knowledgeable and has had great follow-through on issues that took a few days to resolve”.
- “Amber is our contact and has been awesome to work with and is very knowledgeable about the scholarships processes and procedures.”
- “Very helpful, Tina is great!”
“Carol Bergstrom was extremely responsive, knowledgeable and available. I am very happy with the new system, if only all of the new systems on campus were rolled out this well”.

Themes for improvement

Not all comments were as positive – we definitely have some things to improve in the system. Common themes included:

- During peak times, our response times were slower and did cause some frustration.
- The impact of the new process on international students
- The “Pay Staff Tuition” function was rolled out late, and was not as well trained. It also did not function exactly as the old Tuition Authorization system had, which caused some confusion and frustration.
- Because the application of scholarship dollars is owned partially by the Scholarship Office and partially by Income Accounting, some of the transactions were complex and it was difficult to ensure were correct. These were most often the “problem areas”, and needed a lot of follow-up and “babysitting” to get to completion.

To see all comments from the survey, visit Appendix B.

- **Actions taken**: We made many process changes between Fall and Spring semesters, based on lessons we had learned in the fall. These included:
  i. Streamlining of international student refund credit hold process: By working closely with the Tax Services Office, Income Accounting, and the Systems Office, we were able to better design queries to identify when international students might receive a refund credit hold, and to exclude those students from the hold if their refund were due to federal financial aid. We also shared this information with Admissions and the International Student Services Center, because if a student was receiving a refund due to federal financial aid, this most likely indicated a change in their citizenship status that had yet to be updated in PeopleSoft.
  ii. Implementation of new phone system with voicemail: In conjunction with Financial Aid, we implemented a new phone system this year with better call routing and voicemail in summer 2015. While these metrics

2. **Alignment**: This objective is supports the fifth objective in the Student Affairs Strategic Plan, which is “Partner with faculty, staff, and external constituencies to foster student development and enhance the greater community”. I do think this office has done a good job of building new relationships across campus and enhancing departments’ perceptions of central administration.

3. **How these goals, outcomes and supporting data relate to retention and graduation of students**: As departments have more scholarship dollars to give to continuing students, assisting departments in strategically leveraging those dollars will ultimately result in more students receiving scholarships, which should in turn impact retention and graduation metrics.

ii. **Key Activity: Student Campus Experience and Seamless Navigation**

1. **Goal**: I believe there are several facets to this activity. The first is to provide “high touch” customer service to our students (whether that be via phone, email, or in person). The second is to remove barriers and make it easier for students to navigate our processes, either through technology and automation, or through improving our processes and collaborating more with associated service offices.
2. **Desired outcome**: Scholarship Phase 1 changes were implemented to mitigate risks in the scholarship process, as well as lay the groundwork for improving the student experience. To be quite honest, this first round of changes was either entirely non-impacting to students, or some students even viewed the fact that scholarships were first applied to their tuition (vs. simply receiving a check, as they were used to in the past) as a negative change. Until we implement Phase 2, which will create one scholarship database, one scholarship application, and search-match functionality for students, the student experience side will not be drastically improved.

3. **How these outcomes have been achieved or modified**: For the “high touch” portion of student service, we would like to work with Student Assessment and Evaluation to perform a qualitative review of our emails. This should allow us to develop metrics around customer service as it is rendered via email.

4. **Data to support your outcomes**:
   - **Key Findings**: Some of the data from the qualitative review of emails (as mentioned in the previous Key Activity) will also help us build the baseline for the student experience as we begin efforts to align processes and services more closely with other service units.

II. In regards to the new phone system implementation, data for the 2015/2016 year will be included in next year’s report; however, during the busy season in Fall of 2015, we only had students leave two (2) voicemails – all other calls were handled by live people.

   - **Actions taken**: None as of yet.

2. **Alignment**: This aligns with multiple objectives. It supports the President’s dashboard indicator of “seamless navigation”; it also aligns with both Strategic Objective #7 “Provide, maintain, and utilize technology to enhance student services, assessment and communication” as well as Strategic Objective #8 “Promote the effective use of best practices in Student Affairs departments, programs and services”.

3. **How these goals, outcomes and supporting data relate to retention and graduation of students**: Again, it will probably be hard to make a one-for-one correlation between improvements in scholarship administration, interactions between scholarship office staff and students, and student retention and graduation. However, a student’s experience is comprised of not just their classroom time, but also each and every interaction with administrative services; the more positive their experiences are with each one of us, the more positive their overall experience.

ii. **Key Activity**: Support and enhance educational opportunities for staff members, internally and externally.

   1. **Goal**: There are several goals associated with this Key Activity:
      - Document all internal processes and procedures in a way that can be utilized for cross-training purposes, as well as FAQs / Knowledge Base material to share with other departments (such as Financial Aid and Income Accounting).
      - Work with staff to ensure roles and responsibilities synch up with staff strengths and provide fulfilling and challenging work.
      - Provide educational opportunities for staff (both within the U and outside resources).

   2. **Desired outcome**: A documented, easy-to-understand and reference office procedural guide. Performance reviews for each staff member, and an established annual review cycle. Increased job satisfaction and general employee fulfillment.
3. **How these outcomes have been achieved or modified:** Last year was a tough year for the staff that came from the Financial Aid office. This was a big transition for them, and on top of that, the bulk of the office is new people (5 of the 9 people in the office were not formal Financial Aid members during the bulk of the 2014/2015 year). This has understandably led to some turmoil and uncertainty with the staff as we try to figure out how to work together as a team.

The initial conception of the Scholarship Office was a “front office/back office” model, with managers over each side. In practice, however, each person in the office performs activities in both of these areas – from performing trainings with campus partners, to processing awards and printing award letters, to meeting with students. The front/back office paradigm never materialized. During the summer of 2015, this led to a major restructuring of the office, by performing a Reduction In Force (RIF) of the Scholarship Manager position. In addition, one of the senior scholarship counselors in the office left for an outside opportunity before busy season, and the office as unable to fill that role.

4. **Data to support your outcomes:**

   - **Key Findings:** The restructuring of office roles has more closely aligned employee strengths with duties.

   Multiple employees attended professional development opportunities this year, from on-campus Effective Management trainings to Rocky Mountain Association of Student Financial Aid Administrators (RMASFAA) boot camps, and many more.

   - **Actions taken:** We are still in the process of documenting our office processes and procedures, as well as establishing new roles & responsibilities to align with the office restructuring.

5. **Alignment:** This objective aligns directly with the “Provide education that ensures all staff is properly trained to provide professional and competent service” Strategic Objective of the Student Affairs Strategic Plan, as well as our #4 Value of “Exemplary Staff”.

6. **How these goals, outcomes and supporting data relate to retention and graduation of students:** While there is not a direct correlation, having competent staff members who feel fulfilled in their work will provide better service to students, and will turn contribute to an overall satisfaction with the service received.

   - **Utilization Data** [Addresses Part A of Budget Narrative; SA Strategic Objective #3]:

     Our departments do not have a Customer Relationship Management system, and the Comments feature in PeopleSoft is reserved for marking when a system or record change is occurring (for example, we will comment when a student received a scholarship check from an outside entity, but not that the student came to the office to inquire about that check). It is therefore impossible to track true utilization data on a per student interaction basis.

     In terms of scholarships awarded to specific student groups and the impact on overall class shaping, we will provide the data once it is available from OBIA.

III. **Plan for the future**:

   - **Anticipated challenges:**

     i. As mentioned above, Phase 1 of the scholarship changes did not hugely impact (or improve upon) the student experience. Our biggest challenges in the scholarship area are:
1. Scholarship information is stored all over the place – each department (and in some cases, each program) within a college may have their own scholarship pages.
   - This means that students have to hunt for scholarship information.
2. The Scholarship Database that is available on the Financial Aid, Scholarships, and Admissions website as it stands today is out of date and will remain out of date. Departments themselves cannot update it, it is not tied to applications or processing, so Departments have no incentive to keep the information up to date.
3. For the most part, each scholarship has a separate and different application procedure. There are exceptions to these such as College of Engineering; however, for the most part, students must complete and submit separate applications for every scholarship they apply for.
4. The Income Accounting system cannot accommodate all scholarship payments, such as the Traineeship Payments (due to its inability to encumber funds as well as difficulties in generating monthly/bi-weekly disbursements) and payments to International Students (due to the inability to withhold taxes). Due to this, these processes will continue to be “fractured” and/or heavily manual.
5. Processes within the office will continue to be heavily manual without changes to the core PeopleSoft system. For example, when a department enters a “100% tuition waiver”, the following are manual steps that must occur:
   - A person looks up the student’s academic program, residency status, and career (Undergraduate, Graduate, Medical, etc.). Based on this information, the person then determines what amount to put the award on the system for. Each program/resident/career combination can have a different estimated cost of attendance. These tables are currently held in spreadsheets, not PeopleSoft – so there is no way to “automate” this lookup procedure.
   - The estimates are calculated at either the average hours students have taken in that program, or the minimum hours in their program; if the student therefore takes additional credit hours, a report is generated showing that they now owe a balance.
   - A person then manually increases their award to the next credit hour cost of attendance (again, based on the academic program/residency/career combination).

- **Anticipated opportunities:**
  
  i. Our focus over the next 12-18 months will be to either build or buy an integrated Scholarship Management system and process, which will significantly contribute to the goal for seamless navigation. This database will be the one and only place on campus that houses scholarship information. The application process will utilize data from the Admissions application for incoming students (both Freshmen and Transfer), or will offer a single scholarship application for all scholarships on campus (in the case of continuing students). It will include one single, seamless application campus-wide for continuing students, and will make significant headway in our ability to strategically leverage scholarship dollars across the University. In addition, our office will also look at internal processes and identify areas for automation, for improving exception processing, and for improving the customer service we provide to our students.
  
  ii. I would also like to expand our training budget to allow for professional development and growth opportunities for our people. In addition to having more staff attend professional association conferences (like the Rocky Mountain Association of Financial Aid), I would also like to provide customer services and sales training opportunities.
IV. Staff Excellence

Please highlight the great people in your department! Please address the following to the best of your ability. If you do not have any information to share under these headings, please indicate this.

- **Professionalism**
  
  i. We have had staff attend multiple conferences this year, including the Rocky Mountain Association of Financial Aid (RMASFA) Training Bootcamp. We also encourage all staff to attend University-specific trainings (such as P-Card, Travel process trainings, effective leadership and management trainings, etc.). As an office, we are all working to document our office processes and align our core competencies with our job responsibilities and roles.

  ii. Two of our office personnel were on the working committee to redefine the New Hire / Onboarding processes for Enrollment Management, and all of our employees who qualify as mentors are participating in the mentoring process recommended by that committee.

  iii. Office staff have also participated in many of the strategic-level initiatives and task forces created by SVPAA Ruth Watkins, including the Summer Semester Initiative, the Transfer Student Task Force, the Undergraduate Process and Technology Improvement Roadmap, and others.

- **Recruitment and retention of highly qualified staff & c. Retirements, new hires & accomplishments**

  i. To replace the Scholarship Manager position, the office hired a new Donor Relations Coordinator position, to work closely with the Development Office and ensure donor relationships are maintained and encouraged. This new position will result in new capital campaigns and potentially increased dollars for general scholarship funds; however, the impact of the new position will not be felt until later this year.

  ii. As Ruth Watkins said, one of the main accomplishments of our new office is that not one single Dean has complained to her about the new scholarship office or processes. We have had accolades from various Deans (including Sylvia Torti in Honors College).

V. STUDENT AFFAIRS COMMITTEE MEMBERSHIPS

VI. Please indicate whether the committee is Student Affairs (SA), U of U, or another group/organization along with the committee name. If you have a leadership role on the committee, please indicate so in parentheses.

VII.

<table>
<thead>
<tr>
<th>STAFF Name</th>
<th>COMMITTEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harris, Hilerie</td>
<td>Search Committee Member, Admissions Assistant Director for Marketing and Communications</td>
</tr>
<tr>
<td>Cook, Amber</td>
<td>Search Committee Member, Admissions Assistant Director for Recruitment</td>
</tr>
<tr>
<td>Lopez, Cary</td>
<td>Enrollment Management Document Management/Workflow RFP Committee Member, Team Lead Implementation and Training; participant for Functional Requirements</td>
</tr>
<tr>
<td>Lopez, Cary</td>
<td>Residency Appeals Committee Member</td>
</tr>
<tr>
<td>Lopez, Cary</td>
<td>Registrar Appeals Committee Member</td>
</tr>
<tr>
<td>Carol Bergstrom</td>
<td>Search Committee Member, Executive Director for Financial Aid and Scholarships</td>
</tr>
</tbody>
</table>
Appendices:

Appendix A: 2015/2016 Scholarship Awarding Strategy
Appendix B: Scholarship Administration Implementation Survey
Appendix C: Example Award Letter

For additional information, including appendices, please contact either the University Scholarship Office (scholarships@sa.utah.edu) or Student Affairs Assessment, Evaluation and Research (assessment@sa.utah.edu).