

Scholarship Administrators User Manual

Scholarship Administrators User Manual

Scholarship Services

schlp_adminsupport@colorado.edu

Sept. 13, 2024

Table of Contents

Introduction to the Scholarship Administration Policy and Scholarship Administrators User Manual:	3
I. Operational Exemptions:	3
II. Awarding Timeline	3
III. Standardized Scholarship Administration Processes and Best Practices	4
1. Fund Availability, Spend Plan and Usage	4
2. Awarding Tools	5
3. Promotion and Visibility	9
4. Application Collection	9
5. Reviews and Rubrics	11
6. Selection and Awarding	11
7. Determining Financial Need for Need-Based Scholarships	14
8. Overawards (OAs) - Awards Exceeding Financial Need or Cost of Attendance	14
9. Renewals	15
10. Non-Renewals and Appeals	15
IV. Required Toolkit	16
V. Assessment and Awarding Unit Compliance Reviews	16
VI. Definitions	16
VII. Contact Information	19

Introduction to the Scholarship Administration Policy and Scholarship Administrators User Manual:

The Office of Scholarship Services in Enrollment Management ([Scholarship Services](#)) is charged with the centralized responsibility of overseeing compliance with the [University of Colorado Boulder's Scholarship Administration Policy](#) (the Policy) and servicing campus [Awarding Units](#).

Under the Policy, Scholarship Services creates and maintains this Scholarship Administrators User Manual (the User Manual) that applies campus-wide standards to implement the purposes of the Policy. All scholarship Awarding Units must adhere to the Policy and User Manual.

I. Operational Exemptions

Some units with specialized awarding criteria are exempt from following the User Manual but are expected to honor the spirit of the policy. They are encouraged to complete the annual Scholarship Administration Policy and User Manual Training and seek support from Scholarship Services if needed.

1. The exempted units include the University of Colorado Boulder Law School, the University of Colorado Boulder Graduate School and graduate scholarships awarded by other departments, the University of Colorado Boulder Athletics (CU Athletics), and the University of Colorado Boulder College of Music. In awarding their scholarships, these units must abide by Regent Laws, Policies, university policies, campus policies, and applicable law. CU Athletics must also abide by NCAA bylaws.

II. Awarding Timeline

Scholarship Services establishes the Standardized Awarding Timeline (the Awarding Timeline) for undergraduate scholarship application, selection, awarding, and notification for each awarding cycle.

1. Awarding Units must abide by the Awarding Timeline for all undergraduate scholarship awards used for recruitment, retention, and student success, except those listed under the [I. Operational Exemptions](#) section.
 - a. The timeline will be published by October 1 each year for the next awarding cycle (e.g., On October 1, 2024, the timeline for the 2025-2026 Academic Year (AY) will be provided on the [Scholarship Administrator Resources webpage](#)).
2. Application, selection, and awarding cycles begin in the fall semester and conclude in the spring or summer semesters.
 - a. Applications received in the current cycle will be considered for scholarships in the upcoming academic year (e.g., applications collected between November 1, 2024 and June 15, 2025, should be used for awarding scholarships for the 2025-2026 AY).
3. An Awarding Unit's awarding schedule included in the [Scholarship Administration Departmental Toolkit](#) (the Toolkit) should align with the Awarding Timeline dates each awarding cycle.
 - a. A sample Awarding Unit awarding schedule is available in the Toolkit.
 - b. The Toolkit will be referred to throughout this document and must include the following, as applicable:
 - i. Awarding Unit process documentation, details, and responsibilities of the topics contained in the [Standardized](#)

- ii. The Awarding Unit awarding schedule aligning with the Awarding Timeline.

III. Standardized Scholarship Administration Processes and Best Practices

Before an Awarding Unit awards any scholarship, they must designate a [Scholarship Administrator](#). The designated Scholarship Administrator must complete all **required** training provided by Scholarship Services including, but not limited to:

- *Scholarship Administration Policy and User Manual Training*
 - Refresher required annually for all Scholarship Administrators after completion of initial training.
- [Scholarship Award Management System \(BAM\) Training](#)
 - One-time training required to access Scholarship Award Management System (Blackbaud Award Management, or BAM).

Training should be completed within the first month of assuming the role of Scholarship Administrator. Scholarship Administrators should also become familiar with these related policies based on their specific job duties and at the discretion of their supervisor:

- Administrative Policy Statements (APS)
 - [APS #2006](#) Retention of University Records
 - [APS #4016](#) Fiscal Code of Ethics
 - [APS #2027](#) Code of Conduct
 - [APS #2022](#) Colorado Open Records Act (CORA)
 - [APS #4006](#) CU Foundation Transfers
 - [APS #5065](#) Protected Class Nondiscrimination
- Campus Policies
 - [Family Education Rights and Privacy Act \(FERPA\)](#)
 - It's mandatory that all university staff and faculty stay up to date on FERPA training to protect student data and records. Visit the [Office of Registrar's Training & Support page](#) for more resources and information.
 - Office of Financial Aid [Satisfactory Academic Progress \(SAP\) Policy](#).

Responsibilities of a Scholarship Administrator

The following sections outline the primary responsibilities of a Scholarship Administrator. Document the details of these responsibilities in your [Toolkit](#) along with any additional Awarding Unit responsibilities:

1. Fund Availability, Spend Plan and Usage

Scholarship Administrators should determine what scholarship funds are available to award within their Awarding Unit.

- a. These funds may include [Donor/Gift Funds](#) and [Institutional/Departmental Funds](#) in CU-Data (via [MyCUInfo](#) for those with access), there are several financial reports available

based on organization ID (i.e. department number), such as accounting summary fund 34, as well as Advancement Intelligence (AI) reports from the CU Foundation on fund purpose and gift fund statements, etc.

- b. Scholarship Administrators should work with their respective [Fund Manager\(s\)](#) or [Advancement Liaison](#) for assistance if needed, and within their department/with their supervisors for access and training on these reporting options.
- c. The [Office of Advancement website](#) provides a directory of Advancement personnel.
 - i. Additional information/support regarding fund types and spending parameters is available on the [Campus Controller's Office website](#) as are [training opportunities](#) and a [Fiscal Resources for Boulder Campus guide](#) from the Controller's Office.
 - ii. The [CU Foundation](#) also provides training and resources for Scholarship Administrators related specifically to Donor/Gift Funds.
- d. Scholarship Administrators will determine the availability of funding for both Donor/Gift Funded and Institutional/Departmental Funded scholarships by checking the balances within CU-Data and reviewing the [CU Foundation](#) projected earnings distributions when available in March.
- e. We recommend an annual meeting with the Advancement Liaison prior to awarding for the upcoming year to check on any changes, new funds, etc.
- f. For both Donor/Gift Funds and Institutional/Departmental Funds, Scholarship Administrators must create and maintain a spending plan incorporating fund balances, projected earnings distributions from the CU Foundation (when applicable), and scholarship award amounts including both new awards and renewal awards (if applicable). A sample spending plan is available in the Toolkit.
 - i. For Donor/Gift Funded scholarships, the Scholarship Administrator is responsible for collaborating with their Advancement Liaison to ensure a clear understanding of the fund's purpose regarding scholarship awarding requirements and any associated optional donor [stewardship](#) activities.
 - ii. For Institutional/Departmental Funds, the Scholarship Administrator must have a documented [statement of purpose](#) in the Toolkit regarding the use of the funds.

For specific questions about fund balances, stewardship, fund purpose, or other issues relating to the execution of a fund's awarding criteria, Scholarship Administrators should connect with their Advancement Liaison or department's Fund Manager.

2. Awarding Tools

To award scholarship funds to a student, the [speedtype](#) of the designated fund must have an appropriate [expense purpose code \(EPC\)](#) in the Finance system which permits expenses for student aid, and it must have a financial aid [item type associated with it](#).

- a. An item type is the mechanism used in the [Campus Solutions](#) student information system (CUSIS) to record the scholarship in the student's financial aid account and subsequently pay it to their university tuition bill. At the time it credits to the student's tuition bill, the department's speedtype will incur a corresponding charge in the designated account code (typically 770100 or 770400) in the Finance system.
- b. Scholarship Administrators may use one of two methods to record the item type of a scholarship on the student's financial aid account.
 - i. The first and preferred mechanism is awarding the scholarship in BAM.
 - ii. The second mechanism, available only in limited circumstances, is awarding the scholarship by sending an [Institutional Scholarship Awarding Form \(ISAF\)](#) to Scholarship Services.
 1. All scholarships should be processed through BAM to the extent possible. The ISAF should only be used with exception, described in detail in section 2.e.

c. [Item Types](#)

An item type is required to award any scholarship to a student in CUSIS (through either mechanism). Only one speedtype can be used per item type and only one item type can be used per [Portfolio](#) in BAM or per ISAF.

- i. Item Types are not AY specific but do exist either for the academic year (fall/spring), or summer awarding.
- ii. Summer awards will require a different item type from the one used for fall/spring awards.
- iii. When awarding a new scholarship, the Scholarship Administrator will contact Scholarship Services to determine if an item type exists for the speedtype, or if a new item type may be needed.
 1. Item type requests are fulfilled by Scholarship Services via email on a first-come, first-served basis and are subject to our business processing timeline.

d. [BAM](#)

BAM is a scholarship management system which provides functionality for various aspects of the awarding process, including but not limited to:

- Marketing scholarship availability and requirements.
- Collecting scholarship application materials.
- Reviewing and selecting recipients.
- Distributing award communications to students.
- Sending award information to CUSIS.
- Collecting post-acceptance requirements or optional stewardship components, such as thank-you letters.
- Managing renewable scholarships.

Awarding Units **must** utilize BAM unless operating under an approved ISAF-BAM exception.

- i. BAM is prepopulated with certain data elements from CUSIS (students' biographic information, demographic details, and academic statistics) which can be used to identify qualified candidates.
 1. Awarding Units can configure a scholarship [opportunity](#) using only the prepopulated data without having the student submit additional information. This is known as "match drafted."
 2. Awarding units may require students to submit the [CU Boulder Scholarship Application](#) (also known as the general application) as a prerequisite for their scholarship consideration, allowing for the additional information provided on the general application to be used in determining qualification for the scholarship. This is known as "[auto-match](#)."
 3. Awarding Units may also require the student to respond to additional specific prompts such as submitting letters of recommendation or answering specific essays. This is known as "[apply-to](#)."
- ii. Access to BAM is provided to a Scholarship Administrator following successful completion of the required annual training referred to in the introductory section of the [Standardized Scholarship Administration Processes and Best Practices](#).
- iii. Scholarship Administrators may request access to BAM by completing the [Scholarship Award Management Access Request Form](#), which will also be provided upon completion of the Policy and User Manual training.
 1. Scholarship Administrators with access to BAM agree to the terms of use outlined in the BAM User Acknowledgement, which is provided upon access approval.
 - a. Scholarship Administrators should [contact Scholarship Services](#) with any questions.
- iv. Failure by a Scholarship Administrator to complete required training(s) will result in removing access to BAM, which may prevent Awarding Units from posting scholarship awards to students' accounts.
- v. Any Scholarship Administrator who leaves their position must submit the Scholarship Award Management Access Request Form to terminate their access to BAM, or their supervisor must submit it.

- vi. Scholarship Administrators should direct any questions pertaining to BAM to Scholarship Services.

e. [ISAF](#)

Best practice is to award Institutional/Departmental and Donor/Gift Funded scholarships through BAM to the extent possible. When BAM is not applicable for a particular scholarship, an alternate mechanism is to award it via ISAF.

- i. The ISAF enables Awarding Units to award scholarships to a group of students via a singular form. The ISAF may be used for the awarding of [Academic Awards](#) or other pre-determined groups of students.
- ii. In instances where the department believes BAM is not appropriate, they may submit an [ISAF-BAM Exception Request Form](#) to Scholarship Services. The Awarding Unit must explain why BAM is not applicable and document the application process (if applicable) used to select recipients.
 - 1. Only after the Awarding Unit receives approval from Scholarship Services can it proceed with the ISAF.
 - 2. Scholarship Administrators are encouraged to submit requests as soon as possible. Submissions are reviewed on a rolling basis.
 - 3. Exceptions will be approved for one academic year at a time and must be re-issued in future years.
- iii. Acceptance of an ISAF from a Scholarship Administrator will require completion of the required Scholarship Policy and User Manual Training and an approved exception from Scholarship Services.
- iv. Scholarship Services may review ISAFs submitted by Awarding Units for compliance with other aspects of the User Manual.
 - 1. If an Awarding Units' ISAF is selected for review by Scholarship Services, the Awarding Unit must provide to Scholarship Services any related awarding documentation, application process, and selection criteria along with a list of all eligible students.
 - 2. After completing a review, Scholarship Services may direct an Awarding Unit to stop using the ISAF and require the scholarship in question to be managed via BAM.
- v. Awarding units with an approved ISAF-BAM Exception must follow all other best practices and processes described in the User Manual and the Policy.
- vi. Scholarship Administrators should direct any questions pertaining to the ISAF to Scholarship Services.

To award funds that are not scholarships, Scholarship Administrators

will confirm the payment type using the *Student Financial Services Policy on How to Pay Students* and linked *How to Pay Students Flow Chart* found on the [CU Scholarship Administrators Teams site](#).

- a. When an award is not processed by Scholarship Services, Scholarship Administrators must report it to the Office of Financial Aid as Other Financial Assistance or OFA in most cases.
 - i. Scholarship Administrators will review the *12.10.1 Other Financial Assistance Procedural Statement AY2025* from the Office of Financial Aid and use the linked *OFA reporting form* found on the [CU Scholarship Administrators Teams site](#) to report OFA accordingly.

3. Promotion and Visibility

Scholarship Administrators will ensure that all applicable Donor/Gift Funded and Institutional/Departmental Scholarships are entered into BAM and are visible to students when open.

- a. Opportunities must include a comprehensive scholarship description. Descriptions must include eligibility criteria, application requirements, renewal criteria (when applicable), and any post-acceptance requirements, such as program participation, optional event attendance, optional thank you letters, etc.
 - i. Sample scholarship description templates are available in the Toolkit.

Awarding Units are encouraged to use scholarships as part of a strategic recruitment and retention plan when appropriate.

4. Application Collection

Students are encouraged to complete the [general application](#) and any conditional and/or apply-to applications.

- a. Awarding Units using BAM may collect specific scholarship application materials as needed per the respective scholarship criteria. Scholarship Administrators will use one of two application types as outlined below.
 - i. Match drafted opportunities enable departments to automatically match students to an opportunity without requiring the submission of the general application, when appropriate.
 - ii. Auto-match opportunities allow qualified students to automatically enter the applicant pool after completing the general application and [Departmental Application](#), also known as conditional application, (where applicable), without needing to complete an additional or supplemental application.
 - iii. Apply-to opportunities let students apply for a specific scholarship by answering specific prompts. This type of application requires students to submit both the general scholarship application and the specific apply-to scholarship application.

- iv. Application types and details are shown in the table below:

	Prepopulated CUSIS data	CU Boulder Scholarship Application data	Additional opportunity-specific data
Match drafted opportunity	Yes, includes	No, doesn't include	No, doesn't include
Auto-match opportunity	Yes, includes	Yes, includes	No, doesn't include
Apply-to opportunity	Yes, includes	Yes, includes	Yes, includes

v. Qualification Screening

The Scholarship Administrator can customize each opportunity (i.e., scholarship application) using configured eligibility qualifications to maximize a qualified pool of applicants. Scholarship Services can assist in setting up [opportunity qualifications](#).

1. For auto-match opportunities, the qualifications are based solely on data imported from CUSIS into BAM and information provided by the student's general application.
2. For apply-to opportunities, the qualifications are based on data imported from CUSIS into BAM, information provided by the student's general application, and may include information submitted by the student in the apply-to opportunity as well.

vi. Scholarship Administrators will work with Scholarship Services for assistance on supplemental scholarship application questions and reference questionnaires (used to collect letters of recommendation, references, etc.) when such application materials are needed to determine qualified applicants as part of application collection.

1. Awarding Units are discouraged from asking a student to submit something which is already available to them, such as a transcript of CU coursework, when GPA is already provided in BAM. This presents an unnecessary barrier to the student's application.
2. For Donor/Gift Funded Scholarships, Scholarship Administrators will contact their Advancement Liaison for questions pertaining to fund purpose or awarding criteria.

5. Reviews and Rubrics

Scholarship Administrators must ensure that everyone involved in scholarship application review receives the necessary training to have the knowledge, skills, and abilities to work effectively with scholarship-awarding.

- a. This includes Family Educational Rights and Privacy Act (FERPA) training.
 - i. FERPA training is available to all CU-affiliated individuals via Skillsoft in [MyCUInfo](#). Scholarship Administrators should work with [Scholarship Services](#) for support in training [reviewers](#) who are unaffiliated with CU.

Review processes will be conducted by either Scholarship Administrators or scholarship committees within BAM as part of review groups. Review groups are charged with an unbiased scoring of scholarship applications via pre-defined scholarship scoring rubrics.

- b. Rubrics will be stored in BAM and should be developed based on the nature of the scholarship criteria, as documented in the Toolkit or fund purpose, respectively.
 - i. For Donor/Gift Funded Scholarships, Scholarship Administrators will contact their Advancement Liaison for questions about fund purpose and scholarship criteria.

6. Selection and Awarding

The University of Colorado Boulder is committed to providing an inclusive environment where all individuals can achieve their academic and professional aspirations free from discrimination. As such, students must be considered for scholarships based on neutral and non-discriminatory criteria such as academic merit, area of study, [financial need](#), extracurricular activities, and leadership. Scholarships must be administered in compliance with Regent Laws, Policies, university policies, campus policies, and applicable law related to [protected class nondiscrimination](#).

- a. Essays may be used in conjunction with the student's academic record in demonstrating the potential for success at CU Boulder.
 - i. Responses should be used to learn about personal background, determination, achievements, goals, aspirations, and other factors related to their specific eligibility for the scholarship.
 - ii. We appreciate a student's mutable characteristics, such as resiliency, tenacity, activism, and voice.
- b. For example: If an applicant discloses their racial identity in response to an essay question, racial identity itself may not be used as a criterion for scholarship awarding.
 - i. It is acceptable to consider only the applicant's description of their lived experience and its relation to attributes for successful participation in CU Boulder programs.
 - ii. An applicant's lived experiences as individually described by the applicant, as they relate to attributes for successful participation, for example resilience and perseverance, in

CU Boulder programs may be considered.

- iii. This may include, but is not limited to, an applicant's description about how race may have affected the applicant's life, such as through discrimination or inspiration.
- c. When awarding Donor/Gift Funded Scholarships, Scholarship Administrators must abide by the required selection criteria as noted in the fund purpose per the donors' wishes.
 - i. Any preferred criteria noted in the fund purpose should be fulfilled, if possible, but are not required if no students meet both the required and preferred criteria.
- d. Scholarships must be awarded for an academic year, evenly divided between fall and spring, to minimize negative effects on a student's other financial aid. A single-term award is permitted when necessary due to specific circumstances such as the student is graduating in fall; the student matriculates, or first enrolls, in spring; the student receives a summer-only award.
 - i. If a student becomes ineligible for the spring portion of an academic year scholarship, departments can cancel it by working with Scholarship Services.
- e. Student Eligibility

The Scholarship Administrator is responsible for verifying a student's eligibility for a scholarship by using qualifications in BAM and manually reviewing any additional eligibility items as needed.

These items may include factors such as:

- Letters of recommendation
- Enrollment level
- Financial need
- Academic standing

Scholarship Administrators are responsible to verify such factors **before** processing the scholarship award. If a student subsequently becomes ineligible for the scholarship after initial selection (e.g. changes major), the Scholarship Administrator will cancel the award by making all required changes in BAM. After this is complete, the Scholarship Administrator may re-award to a different student when possible.

- i. Scholarships require specific minimum hours of enrollment for an undergraduate student to receive the scholarship [disbursement](#) for that semester.
 - 1. The student must be enrolled half-time in the summer session or full-time in a regular fall or spring semester, unless otherwise stated in a fund/gift agreement or Memorandum of Understanding (MOU) for Donor/Gift Funded scholarships.
- ii. A Scholarship Administrator can approve enrollment-level exceptions in certain circumstances as long as a student is enrolled in at least 1 credit hour in the term in which they are receiving the scholarship:

1. If a student is completing their final semester before graduation and is enrolled less than full-time. A graduation application should be on file.
2. If a student has an accommodation from [Disability Services](#) affecting a student's hours of enrollment, the accommodation must be honored for the timeframe stated in the letter from Disability Services.
3. If there are other extenuating factors, and there is no enrollment requirement stated in the fund/gift agreement or MOU (for Donor/Gift Funded Scholarships), the Scholarship Administrator may notify Scholarship Services of the Awarding Unit's request to release the scholarship funds to the student at less than full-time enrollment status.

f. Deferment and Leave of Absence (LOA) Requests

An incoming undergraduate student may request to defer their admission up to one year. If they do, any [automatic consideration scholarship\(s\)](#) awarded by Admissions is deferred as well.

- i. Scholarship Services recommends that Awarding Units do not defer Donor/Gift Funded or Institutional/Departmental Funded Scholarship awards for deferred students, and instead that they advise the student to reapply for scholarships in the next year.
- ii. A current CU Boulder student may take a LOA from the university of up to three semesters without having to reapply for admission. During this LOA, the student's automatic consideration scholarships awarded by Admissions are placed on hold and the student is eligible to reactivate them upon their return.
- iii. It is the Awarding Unit's discretion whether any other university scholarship(s) can be placed on hold during the LOA. The Scholarship Administrator must review and determine based on the fund purpose or other criteria if the student's Donor/Gift Funded or Institutional/Departmental scholarship can be placed on hold or if it must be cancelled.
- iv. Awarding Units are responsible for making decisions on award deferment or hold requests.
- v. Scholarship Administrators should consult their Awarding Unit's Fund Manager(s) to ensure the funds do not need to be spent in the current fiscal year.
- vi. Scholarship Administrators must document any deferment or LOA approval and are responsible for re-awarding the student when they return.

g. Fund Management Post-Awarding

If an Awarding Unit needs to change a student's funding (e.g., move a student from Scholarship A to Scholarship B for funding reasons), the Awarding Unit or Scholarship Administrator must inform the student in writing before making any changes to the student's funding. The Awarding Unit or Scholarship Administrator should also inform Scholarship Services.

7. Determining Financial Need for Need-Based Scholarships

Student [financial aid data](#) is protected from unauthorized access by the Family Educational Rights and Privacy Act (FERPA) and the Higher Education Act (HEA).

- a. A Scholarship Administrator may request limited data without expressed student consent if the Scholarship Administrator can demonstrate a [legitimate educational interest](#) in the information for purposes of scholarship awarding. Approved data is limited to the following (subject to change):
 - Cost of Attendance (COA)
 - Residency
 - [Unmet need](#)
 - Need range based on SAI.

No other use of the data is permissible, and it may not be shared with any unauthorized user(s) for any other purpose. **Scholarship Administrators may only utilize student financial aid data for determining eligibility for need-based scholarship awarding.**

- b. Certain data elements related to financial need are prepopulated in BAM. It is recommended that Scholarship Administrators use financial need as part of the qualifications in BAM for need-based scholarships, including when a scholarship has a preference for need in the criteria or selection process.
 - i. Additional resources regarding best practices of BAM qualifications for financial need, are available to Scholarship Administrators in the help guides section of the [CU Scholarship Administrators Teams site](#) or by contacting Scholarship Services for assistance.
- c. Due to the sensitive nature of the financial need data in BAM, Scholarship Administrators will have access to only limited information. When additional information is needed, Scholarship Administrators may submit a data request form to Scholarship Services.
 - i. The request form is available on the [CU Scholarship Administrators Teams site](#).

8. [Overawards](#) (OAs) - Awards Exceeding Financial Need or Cost of Attendance

Consistent with federal and state financial aid regulations, and depending on each student's individual financial aid awards, a student's total financial aid package cannot exceed the student's demonstrated financial need as determined by the Free Application for Federal Student Aid/Colorado Application for State Financial Aid ([FAFSA/CASFA](#)), and/or cannot exceed a student's cost of attendance ([COA](#)), as determined by the Office of Financial Aid. This is known as an "overaward."

- a. For students in an OA situation, the Office of Financial Aid must reduce or cancel financial aid (including loans, [grants](#), work-study, and scholarships) as necessary until the student's total

financial aid is within their financial need and/or COA.

- i. Aid will be reduced or cancelled in order of least desirable (loans) to most desirable (grants or scholarships) when possible.
- b. This means that a student who is awarded a scholarship may have another form of financial aid reduced or cancelled due to receiving the scholarship.
- c. See [Determining Financial Need for Need Based-Scholarships](#) for more information.

9. Renewals

Scholarships can be offered to students with the option to renew the award for multiple years provided certain eligibility criteria continue to be met. Each year is referred to as an “iteration” of the award.

- a. BAM can track and renew subsequent iterations of a multi-year scholarship for a student.
- b. Scholarship Administrators must review all multi-year scholarships awarded by the Awarding Unit at least once a year to identify whether students have met the requirements to retain their renewable scholarships.
- c. It is best practice to review students’ eligibility more frequently for scholarships that require students continue to be declared in certain majors or are enrolled in specific programs, departments, schools, or colleges. The recommended frequency for this type of review is before the third Friday of the fall and spring semesters (also known as [census date](#)).
- d. Scholarship Administrators should also revisit any associated spending plans/historical charts upon conclusion of the renewal process.

10. Non-Renewals and Appeals

Students who have not met the renewal requirement(s) for their scholarship are not eligible for the next iteration of their award and the Scholarship Administrator must cancel the scholarship at the time non-renewal is determined.

- a. The Scholarship Administrator must send written notification to the student’s colorado.edu email address of the non-renewal **no later than July 1** of that awarding year. The written notification must state the reason(s) for the non-renewal and instructions for how the student may appeal the non-renewal, if applicable.
- b. Some eligibility factors may not be appealed, such as residency or major. In this case, Scholarship Administrators do not need to allow for an appeal and should simply notify the student of the non-renewal and reason(s).
- c. Awarding Units will have a documented appeal process that includes a timeline for the appeal submission deadline and decision notifications outlined in the Toolkit, as well as in the email to the student.

IV. Required Toolkit

Awarding Units must create and maintain a Toolkit to document their processes and awarding schedule associated with the topics outlined in the User Manual and any other scholarship-related responsibilities.

1. The Toolkit documents the persons, processes, schedules, and tools associated with the administration of the Awarding Unit's scholarships, particularly in the event of staff turnover or reallocation of duties to other staff.
2. Awarding Units should create or update their Toolkit by October 15 each year, ahead of the opening of a new application cycle (e.g., October 15, 2024 ahead of November 1, 2024 application cycle).
3. More information and Toolkit templates are available in the Toolkit section of the [CU Scholarship Administrators Teams site](#).

V. Assessment and Awarding Unit Compliance Reviews

Awarding Units must participate in periodic program assessments performed by Scholarship Services to assess and maximize the Awarding Unit's compliance with the Policy and the User Manual.

1. Scholarship Services' role in the review is to help identify and clear roadblocks for the Awarding Unit, developing a plan to maximize compliance. If the Awarding Unit is making a good faith effort to comply with the remediation plan, they will be considered to be in good standing and we will continue to work to resolve any remaining concerns.
2. Willful and intentional failure to comply with the User Manual will ultimately result in access to BAM and/or ISAF being removed, preventing Awarding Units the ability to post scholarship awards.
3. The purpose of the assessment is to maximize the compliance and scholarship disbursement of every Awarding Unit across campus with the Policy and the User Manual. The outcome of the assessment will determine continued access to BAM and/or ISAF, along with a performance plan to maximize compliance by the Awarding Unit.

VI. Definitions

1. **Academic Award** (Scholastic Award) – A form of financial aid that does not require repayment. Academic awards are awarded to actively enrolled students to recognize exceptional performance, special achievement, honors, etc. Recognition may be related to affiliation in specific courses or academic activities. Award funds offset the expenses directly tied to a student's higher educational [cost of attendance \(COA\)](#) at CU Boulder as established according to Federal regulations.
2. **Advancement Liaison** – Representatives in the Office of Advancement who manage fundraising and the development, implementation, and stewardship of donor funds and their donor/gift agreement or Memorandums of Understanding (MOUs).
3. **Apply-to Opportunity** – In BAM and defined by [Blackbaud Knowledgebase \(Blackbaud KB\)](#), "The apply-to opportunity type allows for supplemental questions to be created. Unlike auto-match opportunities, applicants must apply to these opportunities directly in order to be considered, rather than being automatically matched in."
4. **Auto-match Opportunity** – In BAM and defined by [Blackbaud KB](#), "An

auto-match opportunity contains qualifications criteria created to seek out the most qualified applicants. Unlike the apply-to opportunity, qualified applicants are automatically matched to...the opportunity....No additional action is required by the student.”

5. **Automatic Consideration Scholarships** – Scholarships automatically awarded by the Office of Admissions to prospective first-year and transfer students based only on their admissions application.
6. **Awarding Unit** – Any department, program, college, school, organization, or person that awards scholarships to students on behalf of CU Boulder.
7. **Blackbaud Award Management (BAM)** – see *Scholarship Award Management System*.
8. **Campus Solutions** – Also known as CUSIS or CU Student Information System, is the student information system software platform used by CU Boulder and is available to those with access in MyCUInfo.
9. **CU Boulder Scholarship Application (General Application)** – The scholarship application allows incoming first-year and transfer applicants, as well as continuing undergraduate and graduate students, to apply for multiple scholarship opportunities with just one general application (available at: [CU Boulder Scholarship Application](#)).
10. **Departmental Scholarship Application (Conditional Application)** – In BAM, a Departmental Scholarship Application is an additional application available to a specific group or subset of applicants who complete the CU Boulder Scholarship Application (e.g., a specific college application such as the College of Engineering Application only available to Engineering students once they complete the CU Boulder Scholarship Application).
11. **Disbursement** – When funds apply to a student’s bill or account; this occurs the Monday before the first day of classes for Fall/Spring semesters, or 7 days before the start of summer classes.
12. **Donor/Gift Funded Scholarship (Donor/Gift Funds)** – Funds donated to the university for student scholarships in a fund 34 speedtype, and if endowed generate spendable income through interest each year. Generally deposited at the CU Foundation and accompanied by a fund/gift agreement, Memorandum of Understanding, and/or fund purpose summary outlining required selection and preferred criteria.
13. **Financial Aid Data** – Protected financial aid information that may be releasable, as authorized under the Family Educational Rights and Privacy Act (FERPA) and the Higher Education Act (HEA), to assist in the selection of scholarship recipients when financial need or other such data is part of scholarship selection criteria. Examples of such data include but are not limited to Cost of Attendance (COA), [unmet need](#), and the student’s Need Range (high/medium/low) based on FAFSA/CASFA data or lack thereof.
14. **Financial Need** – An eligibility criterion demonstrated by the FAFSA or CASFA in relation to a student’s COA. More information on how financial need is calculated is available on the [Office of Financial Aid Cost & Financial Aid webpage](#).
15. **Fund Manager (Budget Officer)** – An individual, other than a Scholarship Administrator, managing department funds who ensures funds are administered accurately and reconciled.

- 16. Institutional/Departmental Scholarships** (Institutional/Departmental Funds) – Funds drawn from Institutional/Departmental sources designated to award scholarships that have specific criteria for recipient selection and are administered on behalf of CU Boulder by an Awarding Unit (e.g., general fund, auxiliary, research grant—when applicable, etc.).
- 17. ISAF** – The Institutional Scholarship Awarding Form (ISAF) is available to Scholarship Administrators in [limited instances](#) for awarding of both undergraduate and graduate scholarships. The form is managed by Scholarship Services and may only be utilized when using BAM is not applicable. The form is updated annually and is academic year (AY) based.
- 18. Item Type (IT)** – A 12-digit number set up by Scholarships Services for Awarding Units to award scholarship funds to recipients in CUSIS. It is based on the speedtype for the fund and uses the appropriate rules (such as career, enrollment level, need or merit based) specified by the Awarding Unit to determine whether it can be disbursed. The 30-character maximum scholarship description of the IT is visible to students on their accounts and bills.
- 19. Opportunity** – In BAM, defined by [Blackbaud KB](#), “A scholarship...to which applicants apply is referred to as an Opportunity in the system.”
- 20. Opportunity Qualifications** (Qualifications) – In BAM and defined by [Blackbaud KB](#), “[Opportunity] qualifications are the criteria which an applicant must meet in order to be eligible for an opportunity award. Qualifications are used to narrow the field of all applicants to only the most qualified applicants.”
- 21. Overaward (OA)** – When a student’s total financial aid package exceeds their demonstrated financial need and/or COA, as determined by the OFA and by federal and state regulations.
- 22. Portfolio** – In BAM and defined by [Blackbaud KB](#), “A Portfolio is a single heading or umbrella, of a scholarship, award...to which applicants apply, that bundles together related opportunities. Portfolios contain details about the related opportunities that remain static from year to year. The portfolio is created first, and then the subsequent opportunities are created to collect applications and make awards for specific periods.”
- 23. Renewable Scholarship** (also renewal or renewals) – A scholarship is awarded to a student for more than one semester or academic year based on specific criteria and terms of renewal, with specified limits on the maximum number of terms or credit hours to be covered. Renewal requirements are usually defined in terms of GPA requirements, major/program requirement, and/or earned hours or service and program participation expectations.
- 24. Reviewer** – In BAM, a Reviewer is someone who reviews scholarship applications as part of an established reviewer group in BAM for a specific opportunity or set of opportunities. The Reviewer may occupy the role of Reviewer or Reviewer Chair and will log in to BAM to access their assigned applications.
- 25. Scholarship** – A form of financial aid that does not require repayment. They are awarded to prospective and actively enrolled students to support recruitment, retention, and student success and are typically based on academic achievement and/or financial need. Additional criteria may include departmental and community involvement, leadership, work/volunteer experience, areas of study, etc. Scholarship

funds offset the expenses directly tied to a student's higher educational [cost of attendance \(COA\)](#) at CU Boulder as established according to Federal regulations. The donor and/or Awarding Unit sets the criteria for recipient qualification through the establishment of a fund/gift agreement/MOU or other similar, formally defined method.

- 26. Scholarship Administrator** – Anyone who awards scholarships to students that CU Boulder administers; also defined in BAM as those with user access of Department/Opportunity Administrator.
- 27. Scholarship Award Management System** (Blackbaud Award Management, or BAM) –The software system used by Awarding Units and Scholarship Administrators to award and manage Institutional/Departmental and Donor/Gift Funded scholarships.
- 28. Statement of Purpose** – Documentation of how an Institutional/Departmental Scholarship fund is being allocated year-to-year and the selection criteria being used. A sample of this is available in the Toolkit.
- 29. Stewardship** – Building relationships with scholarship donors by creating a sense of partnership, showing appreciation, and giving donors confidence that CU Boulder is administering the funds per the fund/gift agreement or MOU and being diligent and responsible administrators of the funds. Examples of stewardship may include donor participation in the selection process, collecting optional thank you letters or impact statements, sending the donor new and current recipient information, hosting optional events for recipients to engage with donors, such as a dinner for donor and students, etc.
- 30. Unmet Need** (Unmet Financial Need) – Generally calculated by reviewing a student's COA, [EFC](#), (or [SAI](#) beginning 2024-2025), resulting from their FAFSA/CASFA, less grants and scholarships received (other need-based aid, such as need-based loans may be factored depending on timing of when this calculation is determined). More information is available on the [Office of Financial Aid Cost & Financial Aid webpage](#).

VII. Contact Information

Contact Scholarship Services by emailing schlp_adminsupport@colorado.edu or calling 303-492-4533.