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.

In accordance with 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

a. Due to the nature of some units’ specialized awarding criterion, they are exempt from the best practices and processes described in the User Manual though they are still expected to honor the spirit of the policy. These units are also encouraged to complete the annual Scholarship Administration Policy and User Manual Training and to work with Scholarship Services for support if needed.

   i. 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, and the University of Colorado Boulder Athletics (CU Athletics). In awarding of 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

1. Scholarship Services establishes the Standardized Awarding Timeline (the Awarding Timeline) for undergraduate scholarship application, selection, awarding, and notification for each awarding cycle. The timeline will be published by October 1 each year for the next awarding cycle (e.g., On October 1, 2023, the timeline for the 2024-2025 Academic Year (AY) will be provided on the Scholarship Services website).

2. Application, selection, and awarding cycles begin in the fall semester and conclude in the spring or summer semesters. Applications collected during a current cycle should be used for awarding scholarships in the upcoming AY (e.g., applications collected between November 1, 2023 and March 15, 2024, should be used for awarding scholarships for the 2024-2025 AY).

3. 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 Operational Exemptions section.

4. 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 sample Awarding Unit awarding schedule is available in the Toolkit).
   a. 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 Scholarship Administration Processes and Best Practices.
      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, the Awarding Unit 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 (required annually for all Scholarship Administrators).
- Scholarship Award Management System (BAM) Training (one-time training required prior to system access).

Trainings should be completed within a reasonable timeframe—ideally 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
The following sections describe the primary responsibilities of a Scholarship Administrator. Details of these responsibilities must be adequately documented in the department’s Toolkit as applicable along with any additional Awarding Unit responsibilities:

1. **Fund Availability, Spend Plan and Usage**
   a. Scholarship Administrators should determine what scholarship funds are available to award within their Awarding Unit.
      ii. 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.
      iii. Scholarship Administrators should work with their respective Fund Manager(s) and/or Advancement Liaison for assistance if needed, and within their department/with their supervisors for access and training on these reporting options.
         1. The Office of Advancement website provides a directory of Advancement personnel.
         2. 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.
         3. The CU Foundation also provides training and resources for Scholarship Administrators related specifically to Donor/Gift Funds.
   b. 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.
   c. We recommend an annual meeting with the Advancement Liaison prior to awarding for the upcoming year to check on any changes, new funds, etc.
   d. For both Donor/Gift Funds and Institutional/Departmental Funds, Scholarship Administrators should 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.
e. For Donor/Gift Funded scholarships, the Scholarship Administrator is responsible for coordinating with their Advancement Liaison to ensure accurate interpretation of fund purpose with respect to scholarship awarding requirements and any associated optional donor stewardship activities.

f. For Institutional/Departmental Funds, the Scholarship Administrator must have a documented statement of purpose in the Toolkit as to the use of the funds.

g. For specific questions pertaining to fund balances, stewardship, fund purpose interpretation, 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. 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.

Scholarship Administrators may utilize one of two mechanisms through which to record the scholarship item type on the student’s financial aid account. The first and preferred mechanism is awarding the scholarship in the Scholarship Award Management System (BAM). The second mechanism, available only in limited circumstances, is awarding the scholarship by sending an Institutional Scholarship Awarding Form (ISAF) to Scholarship Services. 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.c.ii.

a. Item Types

i. 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 ISAF or per Portfolio in BAM.

   1. Item Types are not AY specific but do exist either for the academic year (fall/spring), or summer awarding.
   2. Summer awards will require a different item type from the one used for fall/spring awards.

ii. 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, typically 3-5 business days.

b. BAM
i. 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.

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

iii. BAM is prepopulated with certain data elements from CUSIS (students’ bio/demo/academic statistics) which can be used to identify qualified candidates. Awarding Units can choose to configure a scholarship opportunity using only the pre-populated data without having the student submit anything additional (this is known as “match on drafted”). Awarding Units may also choose to require the student submit the CU Boulder Scholarship Application as a prerequisite to being considered for their scholarship, allowing for the additional information supplied on this general application to be used to determine which students are qualified for the scholarship (this is known as “auto-match”). Awarding Units may also require the student to respond to additional specific questions such as submitting letters of recommendation or answering specific essays (this is known as “apply-to”).

iv. Access to BAM is provided to a Scholarship Administrator following successful completion of the required annual trainings referred to in the introductory section of the Standardized Scholarship Administration Processes and Best Practices.

v. 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.

vi. Failure by a Scholarship Administrator to complete the required training(s) will ultimately result in removal of access to BAM, which may prevent Awarding Units from posting scholarship awards to students’ accounts.

vii. Any Scholarship Administrator who leaves their position must submit, or their supervisor must submit, the Scholarship Award Management Access Request Form to terminate their access to BAM.

viii. Scholarship Administrators should direct any questions pertaining to BAM to Scholarship Services.

**c. ISAF**

i. 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.
ii. 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.

iii. 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. Deadlines to submit an ISAF-BAM Exception Request Form for a given semester are listed in the Awarding Timeline.
   3. Exceptions will be approved for one academic year at a time and must be re-certified in future years.

iv. 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.

v. Scholarship Services may review ISAFs submitted by Awarding Units for compliance with other aspects of the User Manual. 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. After completing a review, Scholarship Services may direct an Awarding Unit to stop the use of the ISAF and require the scholarship in question to be managed via BAM.

vi. If using an ISAF to award a scholarship, the Scholarship Administrator must ensure that the process for selecting recipients complies with the User Manual and other applicable University laws and policies. See related policies outlined in the Policy.

vii. Scholarship Administrators should direct any questions pertaining to the ISAF to Scholarship Services.

3. Promotion and Visibility
   a. Scholarship Administrators will ensure that all applicable Donor/Gift Funded and Institutional/Departmental Scholarships are entered into BAM and are made visible to students when open for applications, at a minimum. These scholarship Opportunities must include at a minimum: the scholarship description, eligibility criteria, renewal criteria (when applicable), and any post-acceptance requirements, such as program participation, optional event attendance, optional thank you letters, etc.
   b. 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 CU Boulder Scholarship Application, and any scholarship application within BAM required by the Awarding Unit, to be considered for a scholarship award.
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-on-drafted opportunities allow for departments, if they chose, to have students automatically match to an opportunity when the student does not need to submit the CU Boulder Scholarship Application, when appropriate.

ii. Auto-match opportunities allow for qualified students to automatically match into the applicant pool after completing the CU Boulder Scholarship Application and Departmental Application (when applicable) without having to complete an additional or supplemental application.

iii. Apply-to opportunities allow for qualified students to apply to a specific scholarship application and answer specific application questions to be part of the applicant pool. This type of application requires the student to submit both the general scholarship application as well as the specific apply-to scholarship application.

iv. Application type and detail are shown in the table below:

<table>
<thead>
<tr>
<th>Opportunity Type</th>
<th>Pre-populated CUSIS Data</th>
<th>CU Boulder Scholarship Application Data</th>
<th>Additional Essay/Opportunity-specific data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match on drafted.</td>
<td>✓ Yes, includes.</td>
<td>☐ No, does not include.</td>
<td>☐ No, does not include.</td>
</tr>
<tr>
<td>Auto-match</td>
<td>✓ Yes, includes.</td>
<td>✓ Yes, includes.</td>
<td>☐ No, does not include.</td>
</tr>
<tr>
<td>Apply-to</td>
<td>✓ Yes, includes.</td>
<td>✓ Yes, includes.</td>
<td>✓ Yes, includes.</td>
</tr>
</tbody>
</table>

v. Qualification screening

1. 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.

   a. For Auto-match opportunities, the qualifications are based solely on data imported from CUSIS into BAM and information provided by the student’s CU Boulder Scholarship Application.

   b. For Apply-to opportunities, the qualifications are based on data imported from CUSIS into BAM, information provided by the student’s CU Boulder Scholarship 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 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.

b. Awarding units with application processes outside of BAM operating under an ISAF-BAM Exception, must follow the best practices and processes described in the User Manual and the Policy.

5. Reviews and Rubrics
   a. Scholarship Administrators must ensure that all individuals involved in the review of scholarship applications receive relevant training to ensure adequate knowledge, skills, and abilities to function within and contribute to, an appropriate scholarship-awarding environment including 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 the Office of the Registrar for support in training reviewers unaffiliated with CU.
   b. 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.
   c. Rubrics will be stored in BAM and should be developed based on the nature of the scholarship criteria, as documented in the Toolkit and/or fund purpose respectively.
      i. For Donor/Gift Funded Scholarships, Scholarship Administrators will contact their Advancement Liaison for questions pertaining to fund purpose interpretation and/or awarding criteria.

6. Selection and Awarding
   a. 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 provided without regard for protected classes.
   b. 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. 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.
   c. Scholarships must be awarded for an academic year period (evenly divided between fall and spring) unless there is a circumstance which necessitates a single-term award (i.e., student is graduating in fall; student matriculates in spring; summer-only award).
i. If for any reason a student becomes ineligible for the spring portion of the scholarship, it can be cancelled during the academic year by working with Scholarship Services.

d. 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, etc. Scholarship Administrators are responsible to verify such factors prior to 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/applicable.

1. Scholarships require specific minimum hours of enrollment for an undergraduate student to receive the scholarship disbursement for that semester. The requirement is full-time enrollment/status in a regular fall or spring semester and half-time enrollment/status in the summer, unless otherwise stated in a fund/gift agreement or Memorandum of Understanding (MOU) for Donor/Gift Funded Scholarships.

2. 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:
   a. If a student is completing their final semester before graduation and is enrolled less than full-time. A graduation application should be on file.
   b. 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.
   c. 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.

e. Deferment and Leave of Absence (LOA) Requests:
   i. 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.
   ii. 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 reapply for scholarships in the next year.
   iii. 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.

iv. 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.

v. Awarding Units are responsible for making decisions on award deferment or hold requests.

vi. Scholarship Administrators should consult the Awarding Units’ Fund Manager(s) to ensure the funds do not need to be spent in the current fiscal year.

vii. Scholarship Administrators must document any deferment or LOA approval and are responsible for re-awarding the student when they return.

f. Fund Management Post-Awarding

i. 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 in advance of making any changes to the student’s funding. The Awarding Unit or Scholarship Administrator should also inform Scholarship Services with a courtesy notification when appropriate.

7. Determining Financial Need for Need-Based Scholarships

a. 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 Scholarship Administrator may request the data without expressed student consent if the Scholarship Administrator can demonstrate a legitimate educational interest in the information for purposes of scholarship awarding. 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 pre-populated in BAM and it is recommended that Scholarship Administrators use financial need as part of the qualifications in BAM for need-based scholarships.

   a. Additional resources regarding best practices of BAM qualifications particularly regarding financial need are available to Scholarship Administrators in 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, generally due to timing or specificity of data in BAM, for need-based scholarship awarding, Scholarship Administrators may submit a data request form to Scholarship Services.

   a. In this request, Scholarship Administrators must detail the purpose of the data request and who will have access to the data. If the request is approved, Scholarship Services will provide scholarship applicants’ financial aid data for the
purpose of scholarship administration. The request form is available by contacting Scholarship Services.

8. **Overawards ("OAs") - Awards Exceeding Financial Need or Cost of Attendance**
   a. 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 (OFA). This is known as an overaward when it occurs.
   b. For students in an OA situation, OFA 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.
   c. This means that a student who is awarded a scholarship may have another form of financial aid reduced or cancelled as a result of receiving the scholarship.
   d. See Determining Financial Need for Need Based-Scholarships, for more information.

9. **Renewals and Appeals**
   a. 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.
   b. BAM has the ability to track and renew subsequent iterations of a multi-year scholarship for a student.
   c. Scholarship Administrators must review all multi-year scholarships awarded by the Awarding Unit at least annually to identify whether students have met the renewal requirements to retain their renewable scholarships.
   d. 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 fall and spring census dates.
   e. 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.
      i. 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.
      ii. 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).
      iii. Scholarship Administrators should also revisit any associated spending plans/historical charts upon conclusion of the renewal process.
f. 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. Documented Awarding Unit Responsibilities

Before any Awarding Unit awards any scholarship, the responsible Scholarship Administrator must be adequately trained on the topics outlined above by completing training(s) provided by Scholarship Services. The Awarding Unit must also document their processes and awarding schedule associated with these topics and any other specific Awarding Unit responsibilities using the Toolkit. All Awarding Units must adhere to the Awarding Timeline.

The purpose of the Toolkit is to document the persons, processes, schedules, and tools associated with the scholarship administration of the Awarding Unit’s scholarships, particularly in the event of staff turnover or reallocation of duties to other staff.

V. Assessment and Awarding Unit Compliance Reviews

a. 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. 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. 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.

i. 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

a. **Academic Award** (or Scholastic Award) - A form of financial aid that does not require repayment 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.

b. **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 MOUs.

c. **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 automatch opportunities, applicants must apply to these opportunities directly in order to be considered, rather than being automatically matched in.”

d. **Auto-match Opportunity** – In BAM and defined by Blackbaud KB, “An automatch 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’s…. No additional action is required by the student.”

e. **Automatic Consideration Scholarships** – Scholarships automatically awarded by the Office of Admissions to prospective first-year and transfer students based only on their admissions application.

f. **Awarding Unit** – Any department, program, college, school, organization, or person that awards scholarships to students on behalf of CU Boulder.

g. **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.

h. **CU Boulder Scholarship Application** – The scholarship application allowing incoming first-year transfer applicants, and continuing undergraduate and graduate students to apply for multiple scholarship opportunities with one general application (available at: [CU Boulder Scholarship Application](#)).

i. **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).

j. **Disbursement** – When funds apply to a student’s bill or account; this occurs as early as the Monday before the first day of classes for Fall/Spring semesters, or 7 days before the start of summer classes.

k. **Donor/Gift Funded Scholarship** – (Donor/Gift Funds) Funds donated to the university for the purpose of 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, MOU and/or fund purpose summary outlining required selection and preferred criteria.

l. **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.

m. **Financial Need**—an eligibility criterion demonstrated by the FAFSA or CASFA values in relation to a student’s COA. While unmet financial need may vary, financial need is generally calculated by subtracting a student’s EFC or equivalent index value resulting from their FAFSA/CASFA from their COA (i.e. COA – EFC = Financial Need).

n. **Fund Manager** – (or Budget Officer) An individual, other than a Scholarship Administrator, managing department funds who is responsible for ensuring funds are administered accurately and reconciled.

o. **Institutional/Departmental Scholarships** – (Institutional/Departmental Funds) Funds drawn from Institutional/Departmental sources designated to award scholarships which 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.).

p. **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 AY based.

q. **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.

r. **Opportunity** – In BAM, defined by Blackbaud KB, “A scholarship…to which applicants apply is referred to as an Opportunity in the system.”

s. **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.”

t. **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.

u. **Portfolio**—In BAM 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 remains 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 of time.”

v. **Renewable Scholarship**- (may also be known as renewal or renewals), A scholarship awarded to a student for more than a semester or academic year with defined criteria and terms of renewal and specified limits as to 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.

w. **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 a role of Reviewer or Reviewer Chair and will log in to BAM to access their assigned applications.

x. **Scholarship** – A form of financial aid that does not require repayment 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.

y. **Scholarship Administration Departmental Toolkit**— (Toolkit) documented scholarship administration knowledge base and awarding schedule for Awarding Unit. More information is available on the [CU Scholarship Administrators Teams site](#).
z. **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.

aa. **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.

bb. **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.

cc. **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.

dd. **Unmet Need**—also known as unmet financial need, unmet need is generally calculated by reviewing a student’s COA less their EFC or equivalent index value 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 [OFA Cost & Financial Aid webpage](http://www.colorado.edu).

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