

# The Blackbaud Guide to Your Future Award Management System



Selecting a new award management system can be a daunting task for even the most seasoned scholarship team. Serving as the backbone of your scholarship or financial aid office, the right system can streamline the scholarship process and ensure you are getting the right awards to the appropriate recipients faster and with less effort. It can simplify the work of your applicants, ensuring they are matched to relevant awards and have a positive experience whether they are new to your institution or a returning student. It can also position your organization for future success regardless of how processes, staff, or needs may change. However, the wrong award management system will hinder productivity and frustrate users. Given the time and effort it takes to evaluate, select, and implement a new award management system, this is one decision you can't afford to get wrong.

Used extensively by both scholarship administrators and applicants, an award management system manages the full lifecycle of every scholarship, from the time the student submits their application to awarding the scholarship and stewarding the donor. It houses key data about your students, available scholarships, funds, and donors. The right award management system can help everyone work more efficiently and productively, reducing administrative burden and improving the experience for both applicants and administrators. It can provide key insights and intelligence into your scholarship process and facilitate better and faster awarding decisions. It can improve management of the team's most pressing tasks and provide visibility into each scholarship fund and its lifecycle.

The right award management system will help an organization achieve digital transformation—improving processes, workflows, and collaboration.

But with so many choices and technology options available, how do you narrow the realm of possibilities to choose the best system for your organization?

Whether you're a seasoned pro who has been in the scholarship space for years, or a relative newcomer tasked with leading the selection process, this guide is for you. We'll provide a framework and process that's simple to follow and will help identify those requirements and needs that are most important to your organization. While there are many systems out there, finding the right one may be easier than you think.

## What is an Award Management System?

Some institutions track their scholarships and recipient data in a variety of disjointed tools such as spreadsheets, documents, email, and homegrown databases that have long outgrown their usefulness. These may work for an institution that awards a small number of scholarships per year, but beyond that, the process quickly becomes unmanageable. Information gets lost, awards get delayed, and student data can become disorganized and scattered across many locations, leading to security concerns.

A scholarship management system is software designed to organize and streamline the complex process of finding, applying for, reviewing, and awarding scholarships. With an advanced, modern scholarship management system, all your organization's scholarship applications are digitized, and the review and approval workflow is tailored to your organization's unique needs and process. Critical data about applicants and award funds are all contained within a single system that is secure and readily accessible. API's will import data from external sources already in place to ensure consistency across the institution, dashboards and reports provide real-time answers to your most common questions, revealing insights and data that might otherwise take hours or days to produce. Scholarship administrators, reviewers, and committees all have custom views into the data they most want and the applications and awards most relevant to them. Applicants can see all scholarships available to them in one location, ensuring they have access to as many opportunities as possible. And a good award management system can help ensure that your organization is awarding all of their scholarship funds to the appropriate students, meeting the requirement of donors and improving fund utilization.



“When looking for an award management solution, we wanted a system that was widely and successfully used by our peers at large, decentralized institutions. We also needed to manage our scholarship process from start to finish in a single platform while still meeting the needs of our individual schools and colleges.”

—Keith Brown, Assistant Director of Special Awards,  
University of Wisconsin - Madison

Blackbaud Award Management User Since 2017

## People First, Technology Second

The goal of an award management system is to streamline workflows and improve processes for the people who use it. It should also provide a smooth user experience for your applicants. So rather than starting with the technology, start instead by considering the people who will use it.

Selecting an award management system should be a team effort at your institution. When choosing such an important technology you want to ensure you are getting feedback and understanding the perspectives of everyone who will use the software most often. This includes your scholarship administrators, reviewers, leadership, and even your applicants. If you are a decentralized campus, include representatives from the different colleges or departments on campus. Talk to representatives from financial aid, finance, and admissions. Talk to former applicants about their application experiences and what might make a difference to them. Everyone who might engage with the system should be included and given a seat at the table. Consider forming a selection committee comprised of a cross-section of these colleagues. This group will engage throughout the process to provide critical opinions and insights on their needs, wish lists, challenges, and aspirations.

Asking questions and hosting discussions internally will be the most important activity leading up to the selection of an award management system. Every institution operates

differently, especially if they are on the decentralized end of the spectrum. To help find the right system for your institution be sure to ask open-ended questions to identify what is most important to those who will rely on this new software. For example:

- What do you like most and least about the current award management process and software?
- What is the most challenging part of your work?
- How do you see the department, organization, or overall scholarship program evolving over the next few years?
- How can software help us achieve our current goals and future aspirations?
- How might technology help you better collaborate with your colleagues?
- How might technology benefit our students experience when applying for and accepting awards?

Change management, or how you keep people engaged and informed, is a critical part of the evaluation, implementation, and selection process. By starting with people rather than technology you're laying the groundwork for making decisions that incorporate a wide variety of voices, perspectives, and needs. And keeping everyone engaged and invested throughout the process establishes a sense of shared purpose and commitment to success.

“We were looking for an award management system that would integrate with all of the cloud based products across our campus, bringing consistency and transparency to a previously decentralized process.”

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—Derek Clark, Assistant VP for Advancement Services, University of South Carolina

Blackbaud Award Management User Since 2017

## Understand Your Requirements

Discussions with colleagues will lead to an understanding of their current challenges and hopes for a new system. But to develop a comprehensive perspective into what is most needed in an award management system, you'll need to understand exactly how your organization operates and identify any unique processes, requirements, and challenges that must be supported. Here are a few questions broken down into key focus areas to help identify what makes your organization unique and what is most essential in an award management system.



### Application Process

- Do you have a central application for all scholarships on campus?
- How many different departments or colleges on campus accept scholarship applications?
- Are those applications and processes different, or do they follow the same workflow?
- How do students find scholarships? How easy is it for them to locate all of the awards they are eligible for?
- Where do students go to submit their applications?
- Are students submitting applications via paper or digitally?
- How often do applications change?
- Are applications solicited or unsolicited?
- Do you do any scholarship awarding based on admissions application information or other readily available student information that does not necessitate the student completes an additional scholarship application?
- Does your institution award scholarships via fund swapping?
- What does the fund swapping process currently look like?
- Do funds go unawarded or under-awarded due to a limited applicant pool or under representation of the student body?



### Student Information

- Do you rely on students to provide their information like GPA, etc.?
- How do you verify and ensure you are using accurate student information?
- If you are currently using award management technology, does your SIS integrate?
- Does your current system use student information to match students to the scholarship opportunities they are eligible for?



### Reviewing Process

- Do all of your scholarships follow one workflow through the reviewing process?
- Or are there variations based on college/department, award type, size of the award, etc.?
- How many unique roles are engaged in the reviewing process?
- How many approval steps are required for each award and by whom?
- Do reviewers meet in committees or are awards assigned to individual reviewers?
- Are reviewers looking at applications on paper or digitally?
- How do reviewers communicate their feedback to scholarship administrators so that final awards can be made?



### Awarding Process

- Are awards made from one central office or department?
- How many departments or colleges are awarding scholarships today?
- Does the awarding process look the same in each of those colleges or departments?
- How is final award information communicated to the financial aid or bursar's office?
- What does the process look like for awarding renewable scholarships each year?

## Post-Acceptance

- Do you currently collect post-acceptance information from your award recipients? Post-acceptance information could include thank you letters, impact statements, student photos and bios, etc.
- What does that collection process look like?
- Do you require hand written thank you letters to be submitted?
- What other types of information do you solicit from recipients and how could technology help you improve that process?

## Donor Stewardship

- Do you use any of the post-acceptance information you collect to steward your donors?
- How connected is your scholarship process to your donor stewardship efforts?
- How long does it take you to pull together reports for your scholarship donors? Are you doing those reports manually or using technology to help?
- How accessible is your donor information for students? Are they aware of where their award money comes from?

## Accessibility

- What web browsers will users be using to access the award management system?
- Do the systems you're considering offer multi-browser access?
- On what types of devices will users need to be able to access they system?

## What Should You Look for in an Award Management System?

Many Award management systems provide a core set of functions that are similar. For example, building and hosting online scholarship applications, a portal for applicants to complete their online applications, and workflows that control the reviewing and approval process. However, while most award management systems provide a handful of similar features, they can vary greatly in how robust, configurable, and useful those features are.



A key focus throughout your evaluation process should be on the future. Choosing an award management system that meets today's needs and challenges, while very important, is not enough. You will want to ensure that your award management system is evolving alongside your institution and is sophisticated enough to adapt and change as you streamline and hone your processes. It is also crucial to make sure your award management system vendor is capable of providing the level of support, expertise, and partnership you need to help you make the most of your system.

The following list of features and functionality are starting points for your research and analysis. These can be found in most award management systems, though there's a lot of variability in terms of how configurable and useful they may be. Assess each functional area with an eye towards your organization's particular needs and long-term strategy. Ensure that the award management system you choose provides the features and capabilities most needed by your organization.



## Centralized Scholarship Portal

Will your applicants be able to find all available scholarships in one central location? A common problem institutions face is scholarship funds going unused or being underutilized because they don't have enough qualified applicants. As schools are increasingly paying attention to representation, many also want to ensure that their applicants and award recipients are representative of their broader institution population. Housing all available scholarships in one location makes it easy for students to see what is available and submit an application for every opportunity they are eligible for.

Not only does having a centralized scholarship portal make the application process easier on students, it can also eliminate a large amount of manual work for your staff who may have previously been managing applications on paper or via spreadsheet. An online portal provides a single location for scholarship teams to track applications.



## Auto-Match Applications

Does the award management system automatically match students to awards they are qualified for, saving them time and energy of searching through a database of available scholarships? Does the online application auto-populate student data from the student information system, ensuring applicants are submitting the most relevant information? After auto-matching them to awards they are eligible for, does it allow the opportunity to ask additional questions or collect essay responses?



## Fund Swapping Capabilities

Some institutions, particularly four-year private institutions, practice "fund swapping" where they offer an amount of scholarship money to students prior to their attendance at the school, and once they accept the money, they match them to different funds to meet that amount. Does the award management system you are considering allow you to import a file of students and match them to awards instead of requiring them to fill out an application? Does it provide updated fund information so you can see which funds are still available to be awarded?



## Robust Workflows

Workflow refers to the series of steps that an application progresses through from submission to awarding to post-acceptance. Ensure that your award management system can support your institutions unique workflow (or workflows). Ensure that a completed application can be routed to the appropriate reviewers who can then make the awarding decision and they can either award the applicant or pass it on to the system administrator to make the final award offers. Confirm that an offered award can then be tied to a post-acceptance process, ensuring you receive a thank you letter for the donor or other information you may need for donor reports.



## Renewal Management

Renewable scholarships are commonplace at most institutions. Does your award management system provide a process to manage renewable scholarships smoothly? Does the vendors team provide support each year in managing this process?



## Dashboards and Reports

Your award management system should provide at least basic dashboards and reporting, helping users to easily see the data that is most relevant and useful to their work. Check to see if custom dashboards can be created using data in the system. Dashboards should be share-able and reports should be customizable. Quickly viewing or downloading useful data is usually a key requirement from staff, so dig deep here and ensure that everyone will be satisfied.



## User Roles and Permissions

An award management system must support a wide variety of user roles based on job function and permissions, from reviewers to administrators. Ensure the system allows each role to be customized based on access to certain functions and data.

## APIs and Integrations

APIs and other integrations ensure that data flows freely between your award management system and other technology systems at your institution. For example, many institutions would like their award management system to connect with their student information system (SIS) or financial system. This helps to ensure that student and fund data is always up to date so that scholarship administrators can make awarding decisions in a timely manner. The connections are established through an Application Programming Interface (API) and a robust API is critical for ensuring that your award management system is positioned to work well into the future as new systems and databases are put in place.

## Notifications, Emails, and SMS

Does the award management system alert applicants and reviewers via email or system notification when they have an action due or an award to accept? Can custom emails be sent to applicants based on triggers or certain actions, such as when an application is incomplete or they have post-acceptance information due? Can the system send SMS messages to applicants?

## Donor Stewardship Capabilities

Scholarships and donors go hand in hand, so will the award management system support effective donor stewardship? Does it allow award recipients to submit post-acceptance applications such as thank you letters, photos, and bios? Can it pull individual donor reports together featuring fund financial data, recipient information, and institutional information? Does it provide a space for recipients to learn about their scholarship donors?

## Custom Branding

This one is simple. Does the award management system allow you to add your logo and color scheme to match the rest of your institution's online brand presence?

## Cloud-Based

Modern award management systems are web-based and reside in an offsite data center (the "cloud"). Cloud-based systems don't need onsite servers and don't require users to install any software. The entire application is

available through a web browser. Cloud-based means your users can access the system from anywhere without complex VPN's or remote desktop requirements. While "on-premises" award management systems are rare, this is worth considering.

## Mobile-Friendly

Will your users access the system using a smartphone? Many applicants rely on the ability to search and apply for scholarships via a mobile device. An award management system should be accessible from a mobile device, anywhere there is a connection to the internet, and at any time.

## Other Evaluation Criteria

Technical features and functionality are not the only criteria on which to base a decision. Your award management system will likely be in place for several years and it's essential to partner with a vendor that will become a strategic partner in your success. Will your software provider continually invest in the platform? Do they have an established track record of stability and longevity in the field? Here are several considerations that, in the long run, will prove to be as important as technical considerations.

“Blackbaud’s integrated cloud solutions allow us to work smarter and do our jobs more efficiently. We’ve been able to eliminate many unnecessary additional steps and manual tasks.”

—Liz Shafer, Accounting and Database Coordinator, Cape Fear Community College Foundation

Blackbaud Award Management Customer Since 2016



### Implementation Support

Will the vendor lead the implementation? How much time will they invest in thoroughly understanding your workflows, requirements, and unique needs? Will you have a dedicated implementation team including a project manager that will track and report on status regularly? How are change requests managed? And what happens when you discover an unanticipated change or new requirement? A strong implementation partner will be committed to your success and have a formal process to ensure your satisfaction.



### User Support

How will the vendor continue to support your organization after implementation? Will you be charged for minor changes to your system? What are the terms of their service level agreement, and how quickly will they respond to requests or issues? How can you contact their support team for questions or problems?



### Vendor Stability

How long has the vendor been in business—and serving the award management field—and what is the likelihood they will continue to thrive for years to come? Do they have a dedicated team focused on the higher education industry? An award management system is a long-term investment, and it's important to know that your software provider is here for the long haul.



### Training and Education

What training will be given to you and your staff? Is there an extensive library of videos, documentation, and FAQ's to aid in your ongoing education? Will they provide in-person or video-based training? Will the vendor work with you to develop a comprehensive plan to verify the new award management system meets all of your requirements and expectations?



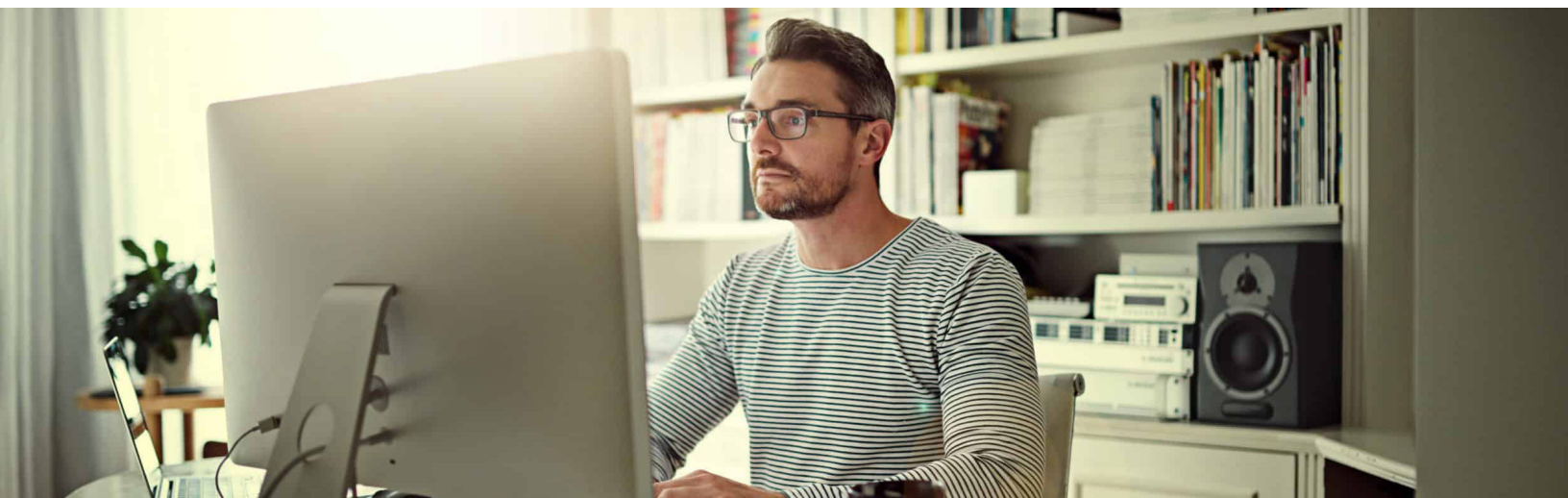
### Solution Comprehensiveness

Is the award management system a stand-alone application, or part of a turn-key package that covers other functions needed by your organization? Is it part of a larger ecosystem of software that serves multiple needs and types of organizations within the higher education space?



### User Community

Is there a well-established, online community of people that use the award management system and are willing to share their experiences, advice, and help? Can you easily discover best practices from others? Does the vendor host annual and regional conferences to unite users, provide training and ideas, and share details about their roadmap and planning? Being part of a robust user community will provide invaluable networking, learning opportunities, and discovery of best practices from peer organizations.



## Key Takeaways

Evaluating and selecting an award management system will be one of the most critical projects you and your team undertake. And while it's challenging, risky, and full of unknowns, following the framework within this guide will help eliminate much of the guesswork and uncertainty. Be prepared to spend time doing your homework, asking a lot of questions, and engaging your stakeholders. A wide variety of perspectives and engagement from your colleagues will help ensure that you make the right decision.

Here are five takeaways to help you get started on the right path towards choosing the best award management system for your organization:

- 1 Find your people.** Selecting an award management system should be a group effort, including colleagues from across your institution. Form a working committee to secure engagement and ensure those who will use the system most play a prominent role throughout the process. Scholarship administrators and reviewers will be key groups to engage.
- 2 Know what's most important for your institution.** Choosing an award management system is about matching a system's capabilities with your organization's needs. Understanding your team's processes, challenges, and aspirations will help you narrow the choices and make the best decision.

- 3 Ask for opinions and referrals.** Many institutions have already forged this path and will gladly tell you what they love or don't love about the system they chose. They will provide invaluable advice and perspective. Don't hesitate to reach out to your network with questions and ask the vendors you are working with for client referrals.
- 4 Pick a strategic partner, not a vendor.** An award management system is a years-long investment, so it's critical to choose a company that wants to become your strategic partner. Select an organization that will invest in your long-term success and commit to supporting you long after an agreement has been signed.
- 5 Change management is key to success.** Most users are nervous about change, and especially new technology. Regularly sharing information about the process and project will go a long way towards earning trust and ensuring support.

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Leading uniquely at the intersection point of technology and social good, Blackbaud connects and empowers organizations to increase their impact through cloud software, services, expertise, and data intelligence. We serve the entire social good community, which includes nonprofits, foundations, companies, education institutions, healthcare organizations, and the individual change agents who support them.

