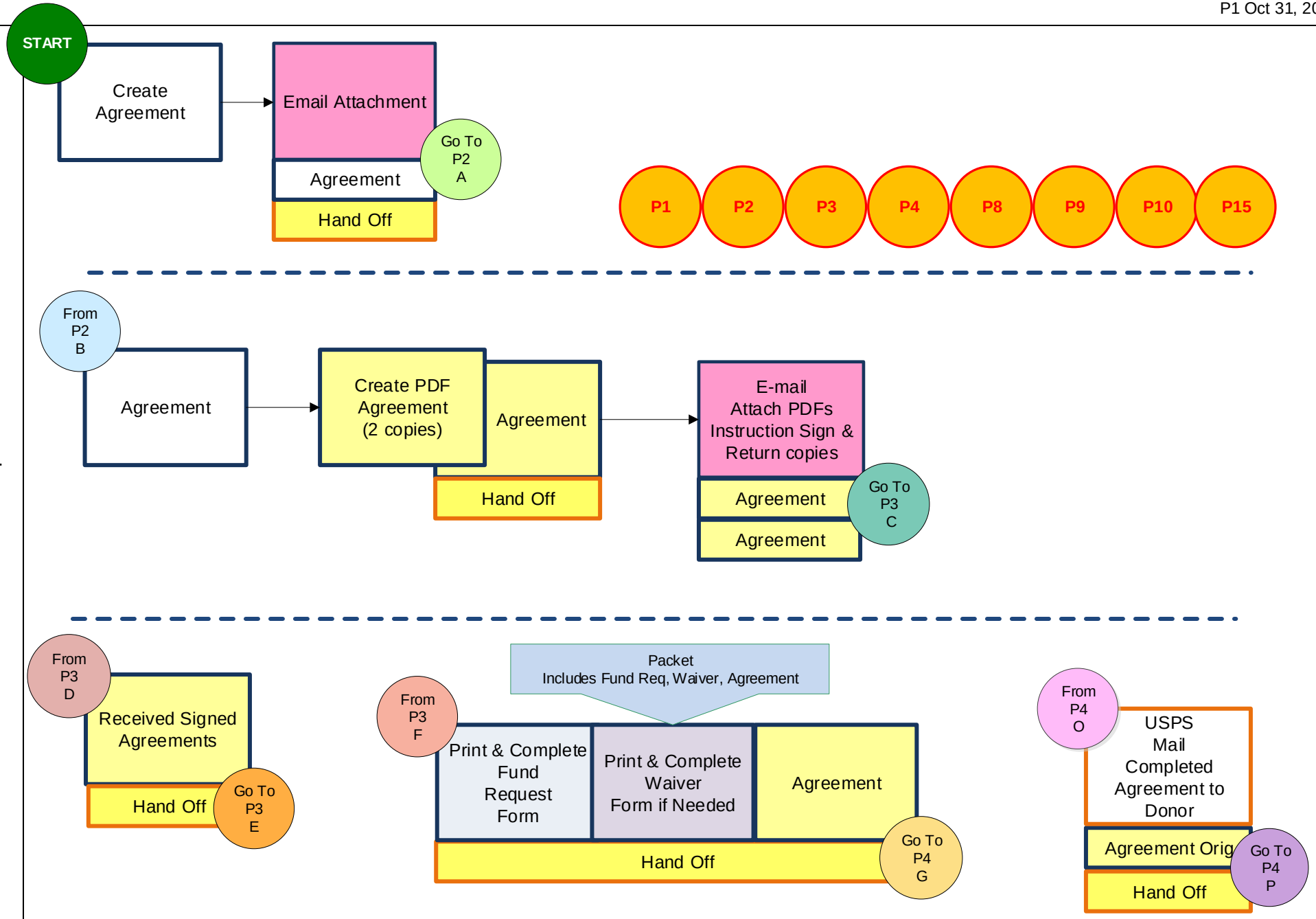
Foundation Scholarship Agreements – 'AS IS'

P1 Oct 31, 2017

Dir. Of Development



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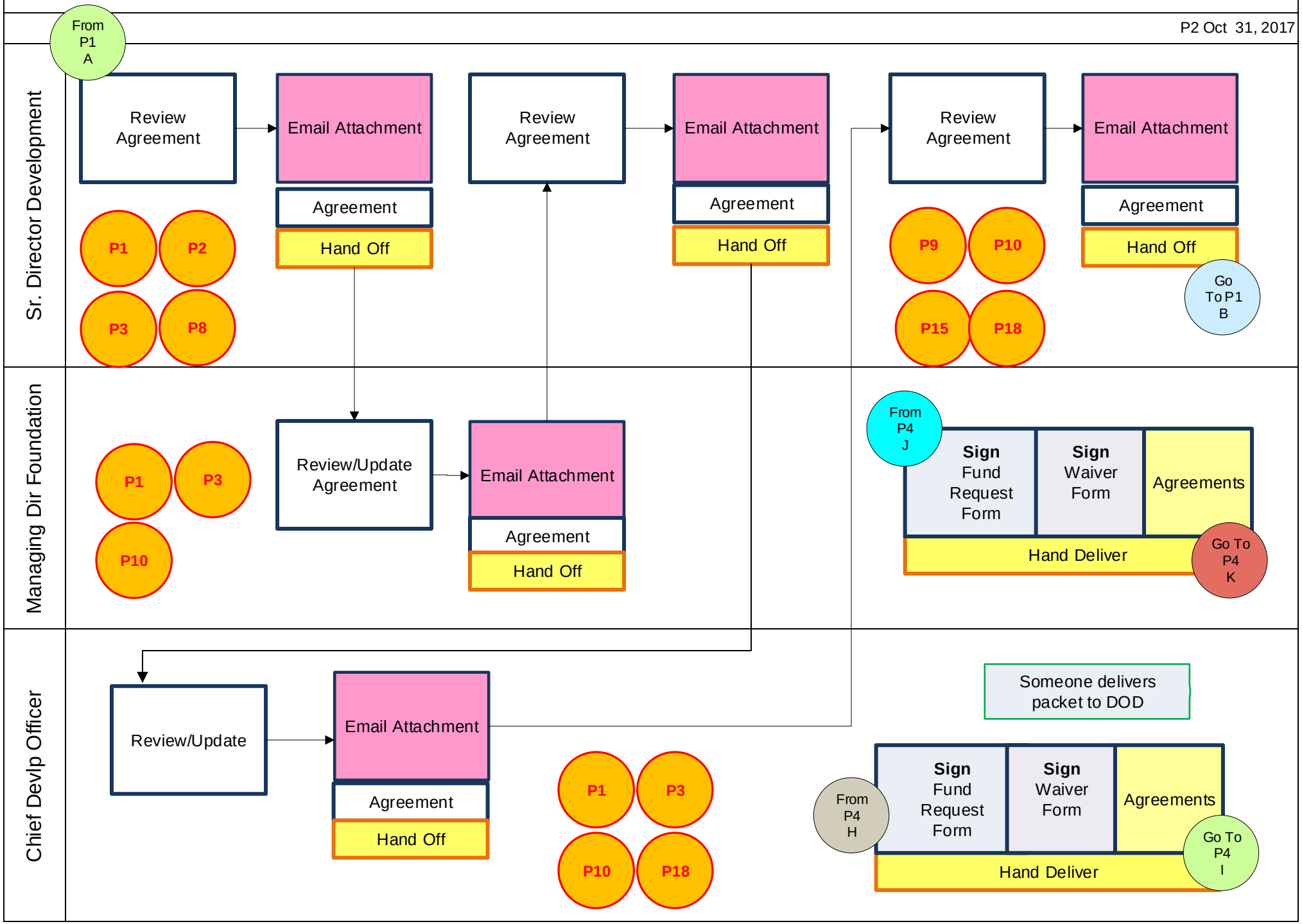
P2 Oct 31, 2017



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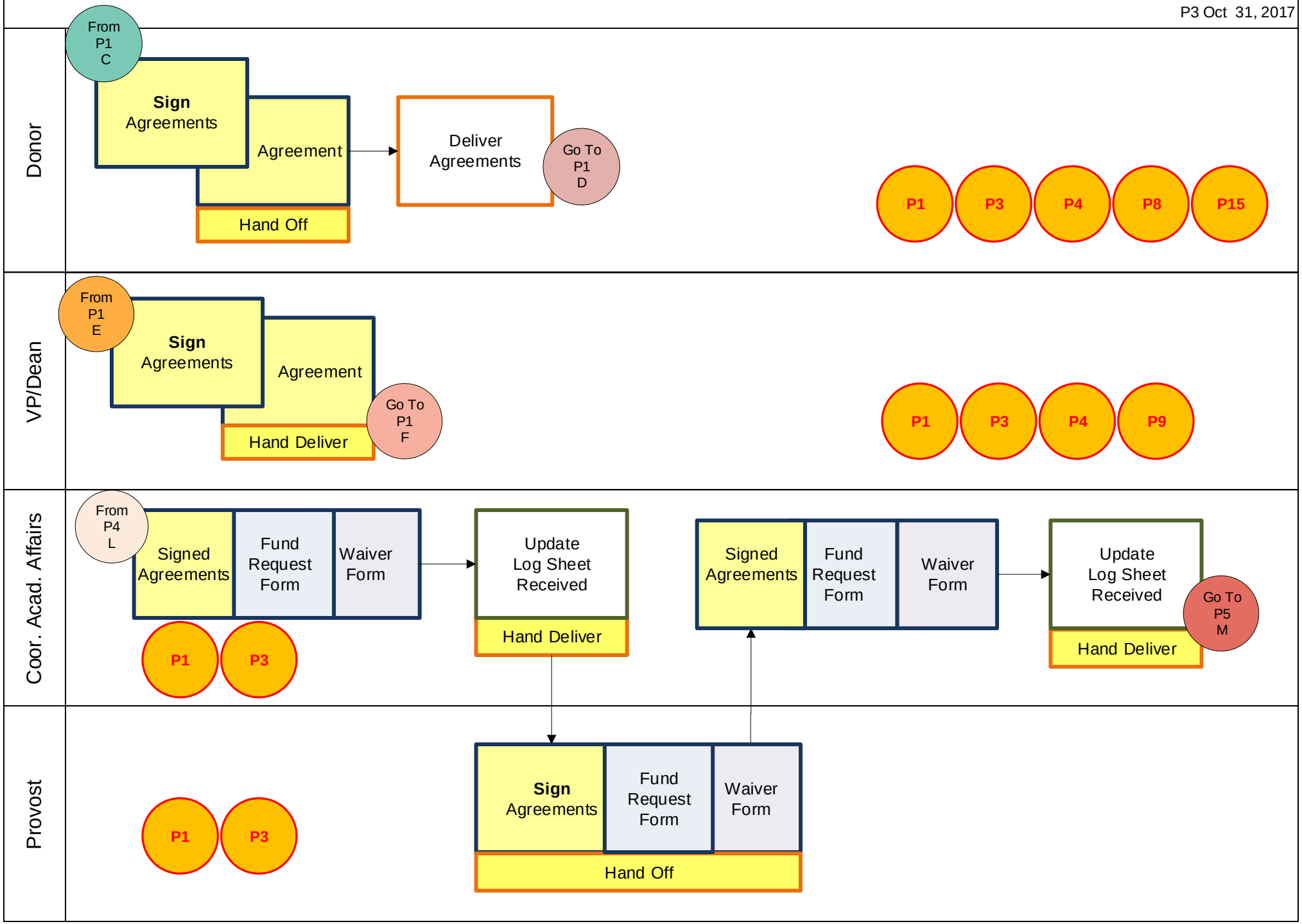

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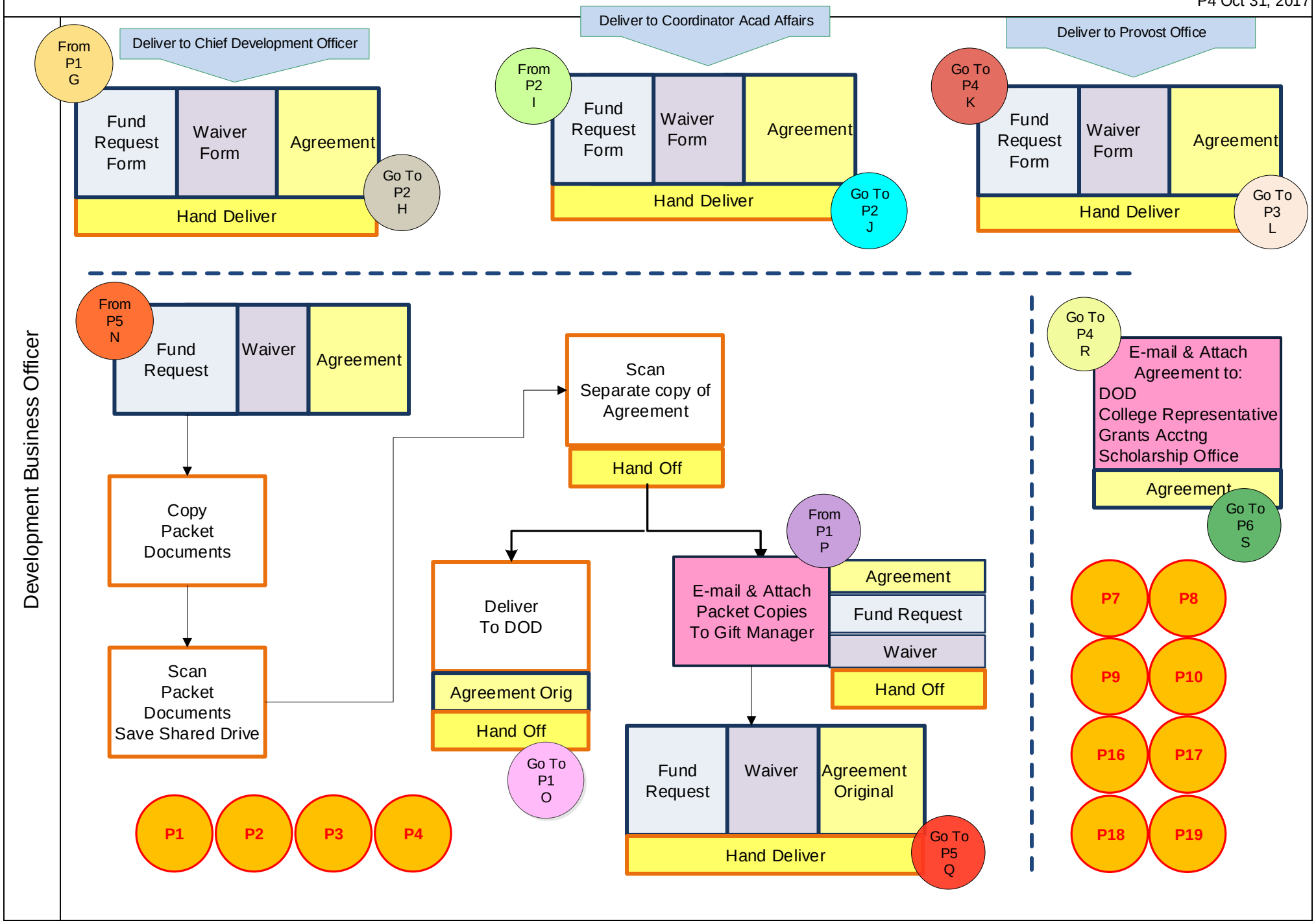

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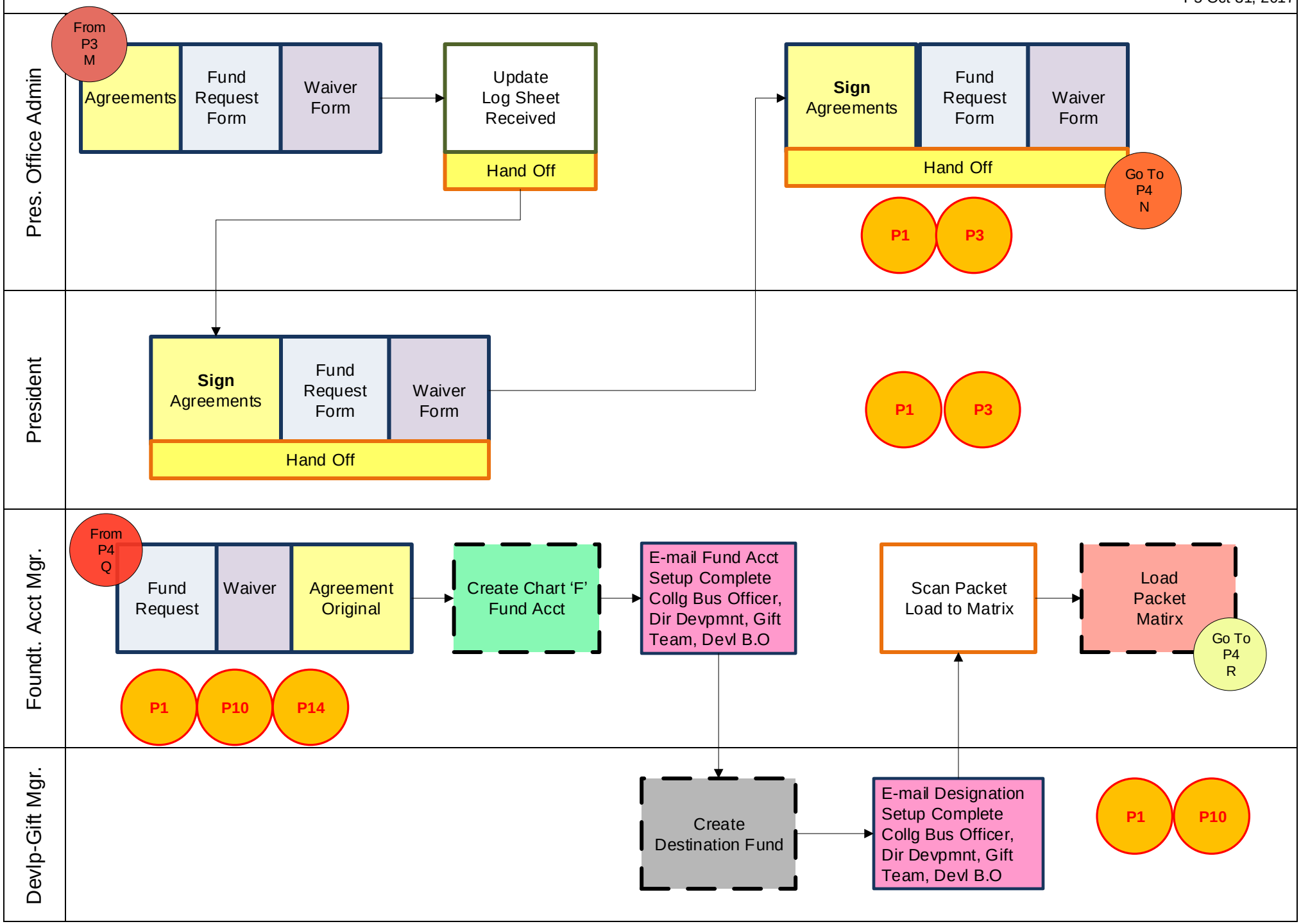
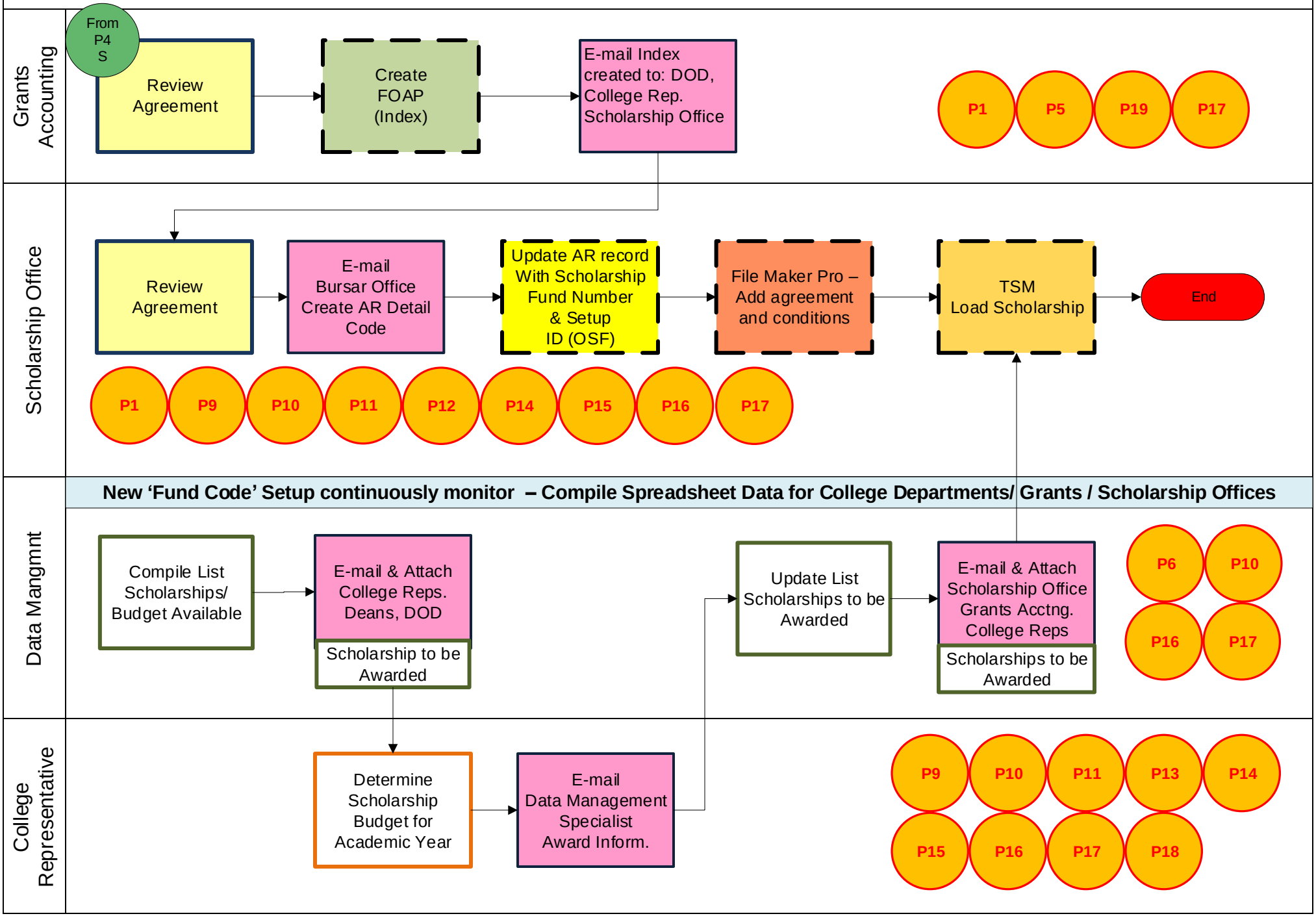
P5 Oct 31, 2017



Foundation Scholarship Agreements – 'AS IS'

P6 Oct 31, 2017



Pains & Issues:
The issues and pain points identified during the AS IS Process Mapping and Analysis workshop are noted below. The issue is numbered and its Root Cause Analysis is in red text, preceded by RCA prefix.

1. Process is paper form.
RCA: There isn't an electronic submission process.

2. There isn't a tracking system to determine status of process.
RCA: Paper manual process.

3. Several handoffs and delivery of paper forms - 27.
RCA: Several reviews and signatures are required in today's process.

4. Multiple copies created to capture original signatures.
RCA: Require original signatures on final documents.

5. Grants offices needs paper copies to validate information.
RCA: These offices do ot have access to Matrix to the final agreement, so paper copies are needed.

6. Manual process to pull all scholarship information needed for department staff members and distributed.
RCA: The university reporting tool is not used to pull and distribute information electronically.

7. Manual process to copy and scan documents.
RCA: There isn't an electronic process.

8. Multiple executive signatures required.
RCA: Procedures currently require executive signatures.

9. Break-down how information is to be distributed to the necessary departments and staff members.
RCA: Procedure documentation needed.

10. Manual email messages are not always clear about information being received.
RCA: Acronyms used are not defined and not always understood for all receivers of the information.

11. Process timeline takes until late spring to award scholarships (April-May).
RCA: Need executive buy-in to move schedule to be prepared to award early late Feb – early March.

12. Duplication of effort loading agreement into File Maker Pro.
RCA: Entering agreement data into separate stand alone systems for record keeping.

13. System generated reports are not available for departments.
RCA: Reports have not been created that departments can run upon demand.

14. Multiple numbers used in the process that are not cross-referenced for ease of identify information.
RCA: There isn't coordination between system setups: Fund number, index number, scholarship number.

Pains & Issues:
The issues and pain points identified during the AS IS Process Mapping and Analysis workshop are noted below. The issue is numbered and its Root Cause Analysis is in red text, preceded by RCA prefix.

15. Agreement forms delayed waiting signatures.
RCA: Paper forms waiting on someone desk to manually approve.

16. Documents are not on a shared drive for offices to access.
RCA: Process is segregated by departments.

17. Changes made to agreement and Scholarship office is not notified.
RCA: Departments are not sharing amendments.

18. Student did not accept award.
RCA Lack of timely reporting and communications.

19. Incomplete documents.

RCA: Documents are routed without

Analysis of the 'AS IS' process

1. Are all roles essential? What roles could be considered to be eliminated? No - maybe the top executive signatures

2. What is the number of hand-offs? 27

3. Are any steps automated? No

4. What steps can be eliminated? Some of the signatures, mailing agreement USPS, scanning, copying, manual spreadsheets, manual emails

5. What steps could be automated? Emails, signatures, routing

6. What tasks consume the greatest amount of time? Creating the budget spreadsheet, collecting signatures, loading budgets with timeline constraints

7. Does each task add value? All but the Provost and President signatures

8. What steps should be added? None

9. Iterations (how many times is process repeated in a timeframe)? Monthly

10. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) 1%

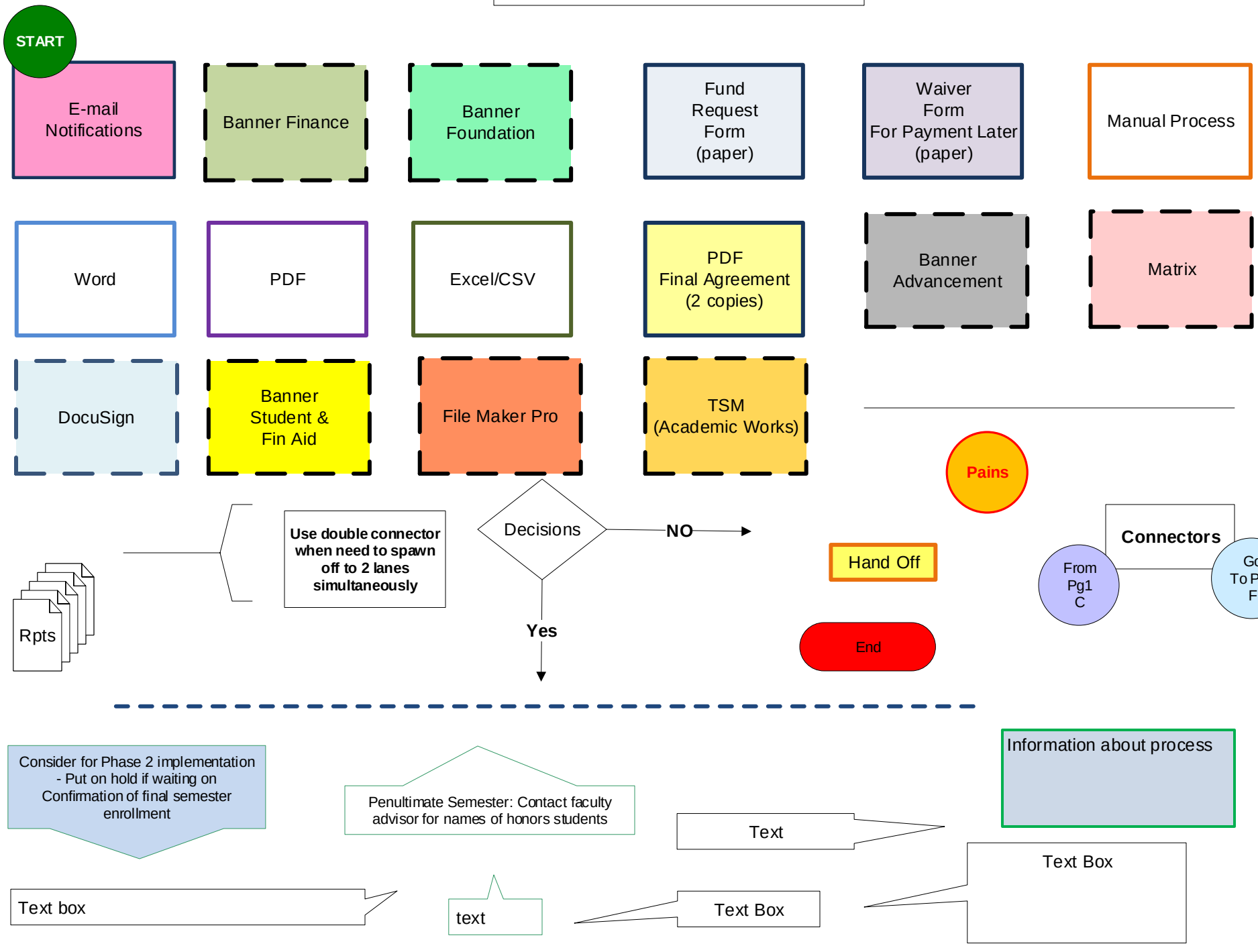
11. % FTE and/or estimate time takes for each key role in the process.

Director of Development – 10%	Foundations – 10%
College Rep - 50% (100% Fall)	Business Officer – 15%
Gift Mgr. – 70%	Scholarship Office – 80%

12. Metrics – identify measurable outcomes (time, manual steps, paper, manual communications, unnecessary reviews & approvals). Identify current time spent on task for roles: Estimated 400 new agreements * 45 = 18,000 hours

DOD- 8 hours	VP/Dean – 1 hour	Provost Coordinator – ½ hour	Provost – ½ hour
Sr Director – 4 hours	Assoc. VP – 1 ½ hours	Chief Devl. Officer - 1 ½ hour	Business Officer – ½ hour
President – ½ hour	President Admin – ½ hour	Fund Acct Mg.r – 1 hour	Grants – 7.5 hours
Scholarship – 7.5 hours	Gift Manager – ½ hour	College Rep – 7.5	Data Mgr. – Oct – Jan 100%

Legends


START
E-mail Notifications
Banner Finance
Banner Foundation
Fund Request Form (paper)
Waiver Form For Payment Later (paper)
Manual Process
Word
PDF
Excel/CSV
PDF Final Agreement (2 copies)
Banner Advancement
Matrix
DocuSign
Banner Student & Fin Aid
File Maker Pro
TSM (Academic Works)
Pains
Use double connector when need to spawn off to 2 lanes simultaneously
Decisions
NO
Yes
Hand Off
Connectors
From Pg1 C
Go To Pg1 F
Rpts
End
Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment
Penultimate Semester: Contact faculty advisor for names of honors students
Information about process
Text
Text box
text
Text Box
Text Box