THE UNIVERSITY OF MEMPHIS.

University Process Improvement
Foundation Scholarships Outcomes

The Foundation Scholarship team met to review current procedures and practices related to setting up and budgeting scholarships funded through gifts to the UofM Foundation. Identify efficiencies, streamline communications, and ensure that the right departments and individuals are included in the process.

DocuSign Scholarship Agreements:
- Consolidated three paper forms (Agreements, Publicity Consent and Waiver).
- Provides systematic routing for approvals.
- Captures e-signatures.
- Automated emails throughout the approval process.
- Dashboard provides tracking and status of form.
- Standardized format for all agreements.

DocuSign Fund Request Form:
- Contains all the fund codes in one source document needed by all parties.
- Includes Foundation Index number, Finance Index number, Gift Designation code, Scholarship OSPs.
- Eliminates staff calling various departments for this information.

Streamline process by Eliminating:
- Departmental staff creating logs for tracking location of documents.
- Provost signature requirement on all documents.
- Twenty-seven (27) paper form handoffs by using electronic process.
- Departments making copies of agreements.

New Report:
- Developed a report department staff can process on demand that provides critical information on Budget amount, Scholarships Accepted, Scholarships Applied, Non-accepted Awards and Balance available.
- This tool will assist departments in making timely decisions to award any unawarded scholarships.
- Ensure that students are benefitting from foundation funds available to them.
- Donor funds are being appropriately used.

Campus Training:
- Held training for departmental staff across campus involved the scholarship process.

Metrics:
- Term negotiations will be held external prior to the creation of the agreement, therefore eliminating the following approvals on the agreement contract; Chief Development Officer and Provost.
- Eliminated President Admin and Provost Coordinator roles of keeping tracking logs.
- Eliminated copying, filing, tracking of documents.
- Estimated time savings by using an electronic approval process is 5,000 hours of staff time.

FUTURE RECOMMENDATIONS:

- Improve the current Scholarship budget process
- Improve the travel/meal reimbursement process for Directors of Development.
- Create training video to reside in Learning Curve.