Nomination for Larry L. Sautter Award for Innovation in Information Technology – 2021

Project Title
Scholarship Matching Program
University of California, Berkeley

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Project Overview
The custom Scholarship Matching Program (SMP) module supports the Financial Aid and Scholarships Office’s (FASO) awarding and stewardship of donated scholarship funds. This is critically important as Berkeley anticipates an infusion of new scholarship funds resulting from the Light the Way fundraising campaign.

Project Narrative
The legacy system was at the end of life after 16 years of service and needed to be replaced. The legacy system also required technical support throughout the award year to prepare for awarding, to make updates to fund information and to make changes to reports. This requirement limited flexibility and growth.

The design of the new system emphasizes user control by providing sophisticated configuration building blocks that drive the user’s ability to meet evolving donor selection criteria, increased volume in funding sources, and provides users online, real-time access to maintain and update critical fund information that impacts successful matching. Additionally, while this is a custom
bolt-on, it integrates with two Oracle delivered tools, the Custom Attribute Framework and Award Entry, to provide flexibility and automation.
Users will see significant improvement in processing time, automation, and flexibility:

- Turnaround time on batch processing has gone from 24-36 hours to about 10 minutes allowing users to move through awarding cycles more quickly. This has improved fund expenditures in PRD-like environments.
- Users can configure the new system to allow for automated swapping of generic paid funds for targeted donated funds, which also increases fund expenditures.
- Stewardship of donated funds is improved by giving users more control to run targeted matching cycles and by providing an online mechanism to update fund balances throughout the award year.
- Fund restrictions can be customized without limit by using a combination of integrations with Oracle delivered Custom Attribute Framework fields and the new configuration tool for fund restrictions (awarding criteria).
- As a result, users are able to confidently assure potential donors that the university will be able to match and spend their funds as specified. Users also have custom fund and student pages that provide a one-stop location for attributes that impact awarding. Custom tables for this data also provide simplified data mining for donor reporting.

The success of this project was measured in terms of user control of data and setup, processing time improvements, increased automation and fund expenditure percentages increase during extensive testing in PRD-like environments.

There was close collaboration between the SIS Development and BSA teams with the Financial Aid and Scholarships Office. The Development Team was highly invested from the beginning as they understood how this project would ultimately help students. They also understood the increasing need for a successful project because of the fund-raising efforts of the Light The Way campaign. Their enthusiasm for this project was built on its impact and challenge. Additionally, legacy system developers provided support for conversion efforts and legacy data structure information.

This project was deployed in phases over the past year. This deployment method allowed FASO users to become familiar with the new system as they configured each newly deployed element and as they reviewed converted scholarship data. FASO will begin using the new system to award scholarships for the 2021-2022 aid year, beginning in July/August 2021.

The technology utilized for this project is the Oracle ERP PeopleSoft system, the Application Engine and PeopleCode functionality, and the Process Scheduler to batch the SMP results.
The page allows users to define the terms of a matching process. With options on both the fund and student selection, users are able to conduct either broad and sweeping, or very targeted matching processes.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Item Type name</th>
<th>Fund Attributes</th>
<th>Fund Restrictions</th>
<th>Fund Balances</th>
<th>Exclusion Criteria</th>
<th>Award Eligibility</th>
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- **International / Non-Res:**
  - Loan
  - Nominated
  - Renewable
  - Replace Def Help
  - Requires Need
  - RGB Fund

- **Multi Year Gift (MTG):**
  - MTG Begin Aid Year
    - Award Min: $1000.00
    - Award Max: $1000.00
  - MTG End Date

- **Exclude Students**
  - Bracket (D)<br>  - Name

**Page Statistics**

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- Last Updated: 04/27/21 10:37 AM
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**Fund Attributes | Fund Restrictions | Fund Balances**

**Item Type Name:** [Enter Name Here]

- **Use Estimates:** No
- **Estimated Start Balance:** $32,589.90
- **Disbursements:**
  - **Total Available:** $33,515.73
  - **Encumbered:** $28,317.00
  - **Remaining Balance:** $5,198.73
  - **Count:** 5

- **Fiscal Offer Amount:** $33,514.00
- **Actual Adjustments:**
  - **Adjusted Est Start Balance:** $0.00
  - **Actual Balance Adjustment:** $0.00

**Bal Memo:** [Enter Memo Here]
This page summarizes all student attributes used to match scholarships. This data is pulled from throughout Campus Solutions tables and is easily retrievable through custom records for reporting purposes.

This page displays custom student attributes configured using the Oracle delivered CAF tool.