

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

Project Title

Scholarship Matching Program
University of California, Berkeley

Submitter

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Project Team Leaders and Team Members

Leslie Wills, Functional Team Lead & Designer, SIS
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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.

SIS Cal State SOLUTIONS QAT

Financial Aid Scholarships

Run Control ID test Process Monitor Validate Funding

Run SMP

*Aid Year 2022 2021-2022

Fund Selection

By Category

Code	Category	*Priority	DirRpt	Preference Treatment

By Item Type

*Item Type	Preference Treatment

Students Restrictions

Enforce Citiz/PermRes Check

Profile Complete

Exclude Student ID

Student Selection

By Placeholder / Item Type

Placeholders

Item Type(s)

By LMT

Query Name

Item Type to be Replaced

Save Add Update/Display

This page allows users to dictate 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.

Fund Attributes Fund Restrictions Fund Balances

Item Type Aid Year 2020-2021 Status Active SMP include

Item Type Name

*Account Name

Account 57440 U/G Scholarships-General *Category Unrestricted *Hard To Award No

Dept 57440 *Fund Type Foundation Endor *UCOP Need No

Fund 43199 FFASO Std Aid General *Donor Rpt Val Donor Reported *UCOP Merit No

Pgm 78 Student Financial Aid *CADS Alloc Cd FW5006000 *UCOP Diversity No

Chrtfld1 UFS000 Unrestricted Scholarships UCOP Rpt Code SB8 *UCOP Endow Yes

Chrtfld2 AY21 20/21 Award Year Split Code SB Seq *UCOP Gift No

Equity Award Y

Meet Need/Cost Straight Need/Cost

International / Non-Res Multi Year Gift (MYG):

Loan MYG Begin Aid Year

Nominated *Award Min \$300.00

Renewable *Award Max \$15000.00

Replace Self Help Number of Awards

Requires Need

RGB Fund

Exclude Students

Student ID	Name

Short Terms

Fund Memo

Award Msg Number S603

The was established in 1996 through a bequest of . are awarded to undergraduate students in any field of study. Although was not a Berkeley graduate, she was loyal to Cal throughout her life. After graduating from high school she studied the cello and traveled extensively. Through her travels she became interested in anthropology and, beginning in 1979, was a volunteer photo archivist at the Hearst Museum of Anthropology for 14 years. Her son, , graduated from Berkeley in 1967 with a B.A. in genetics. In memory of supported the building of the genetics and plant biology complex.

Page Statistics

Last Updated By Last Updated 04/27/21 10:37:50AM

Save Return to Search Previous in List Next in List Notify

Item Type **540-2020-2021** Aid Year 2020-2021 Status Active
 Item Type Name **540-2020-2021**

*Line#	*Restriction Code	*Code Value	Rank	*Cons Lvl	*With or Btw Constraint	*With/Btw Operator	*Restriction Type
1	GRADE_LVL_FALL	3	0	1	WITHIN	OR	Restriction
2	GRADE_LVL_FALL	4	0	1	WITHIN	OR	Restriction
3	GRADE_LVL_FALL	5	0	1	BETWEEN	AND	Restriction
4	MAJOR	25975U	0	2	WITHIN	OR	Restriction
5	MAJOR	25966U	0	2	WITHIN	OR	Restriction
6	MAJOR	25967U	0	2	WITHIN	OR	Restriction
7	MAJOR	25968U	0	2	WITHIN	OR	Restriction
8	MAJOR	25971U	0	2	WITHIN	OR	Restriction
9	MAJOR	25972U	0	2	WITHIN	OR	Restriction
10	MAJOR	16288U	0	2	WITHIN	OR	Restriction
11	MAJOR	04746U	0	2	WITHIN	OR	Restriction
12	MAJOR	045A7U	0	2	WITHIN	OR	Restriction
13	MAJOR	04847U	0	2	BETWEEN	AND	Restriction
14	SMP_ADMIT_COUNTY	034	0	3	NONE	NONE	Preference

Save Return to Search Previous in List Next in List Notify Add

Item Type **540-2020-2021** Aid Year 2020-2021 Status Active
 Item Type Name **540-2020-2021 Sch**

*Use Estimates **No**

*Estimated Start Balance \$32897.90 Cut Rate % 0.00 Adjusted Est Start Balance \$0.00
 *Actual Start Balance \$32897.90 Actual Balance Adjustment \$0.00
 Roll Forward Balance \$617.83
 Bal Memo

	Offer	Disbursement	Fiscal Offer Amount
Total Available	\$33,515.73	\$33,515.73	\$33,514.00
Encumbered	\$28,317.00	\$28,317.00	
Remaining Balance	\$5,198.73	\$5,198.73	
Count	5	5	

Save Return to Search Previous in List Next in List Notify Add Update/Display

Local Address		Home Address	
Gender	Birth Place	Home County	Birth Date
Budget \$18,489.00	Need \$14,969.00	Fall 4th Year	Spring 4th Year
MCAP Gift \$3,040.00	GAE \$15,589.00	7.00	136.000
Admit Term 2155	SSA Citizenship Ind A	Marital Status Single	Grad Level
Admit Type	ISIR INS Match	Pack Plan UG	Enrolled Units
Scholar Type RC	UCB Citizenship 1	Completed Units	

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.



Ethnicity	Accommodation
Code	Code
LATIN	ADD
MEXICAN	LD

Renewable Scholarship				
Aid Year	Item Type	Offered	Disbursed	Description
2021	941403140000	\$2500.00	\$2500.00	Thermo-Fisher Sci Scholarship
2021	941403710000	\$500.00	\$500.00	Avenali,J&P Scholarship

College - Major			
College	Name	Major	Name
UCOE	Undergrad Engineering	16330U	Mechanical Engineering BS

College - Minor			
College	Name	Minor	Name
UCOE	Undergrad Engineering	251079U	Ethnic Studies UG

High School				
ATP Code	HS Name	HS Grad Dt	School Type	HS Owner
053515		06/01/2015	HS	Public

Community College	
CC ATP Code	Community College
004395	Los Angeles Harbor College
004400	Los Angeles Trade-Tech College

Local Address		Home Address	
Recruiting Codes			
Code	Description		
Custom Attributes			
Attribute	Value	Description	
SMP_ADMIT_COUNTY	019	Los Angeles County	
SMP_SCH_PROFILE	PROFILE_RECEIVED	Scholarship Recipient Profile Received	

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