

Custom Application Development: Endowed Scholarship Validation Program

Client **Mount Holyoke College**
Founded in 1837, Mount Holyoke is a premier research liberal arts college for women renowned for its academic rigor and internationalism.



Challenge Cost-effectively identify and assess student eligibility for endowed scholarship decisions

Mount Holyoke College alumnae and other donors have created numerous endowments to provide ongoing scholarships. In a number of cases, donors designate specific criteria (e.g., majors, GPA minimums, parent's employment, etc.) for how the scholarships are to be awarded. In order to match student eligibility with these requirements, the College had been using a manual process that imported data from a home-grown enterprise system into a PC-based reporting tool. After replacing their legacy system with Datatel Colleague, an advanced enterprise resource planning solution, the College needed new functionality for validating endowed scholarship eligibility.

Objectives

Mount Holyoke's prior validation process had several issues to be addressed with any new solution. First, they sought to automate as much of the process as possible. Second, they wanted to integrate the solution within Datatel Colleague to leverage all of the endowment fund and student information it contains. Third, they wanted to store all of the data in, and keep student information from leaving, Colleague's centralized secure database. Finally, they wanted the ability to track and report on all endowment scholarship-related activity over time.

Discovery

Based on these objectives, and recognizing that no off-the-shelf solutions offered the functionality they needed, Mount Holyoke's Administrative Computing Department turned to IData because of their past experience with the College, extensive background and experience with Datatel, top-tier talent and competitive rates. While the College's internal team of 5 programmers does a lot of custom work themselves, they previously had contracted successfully with IData for complex customization work and to augment their IT needs. The Department was particularly impressed by the talent and expertise of IData's project director, Ken Dezio, as well as the high quality and dedicated work ethic of IData staff in general. "We didn't hesitate to call upon IData again as they are so responsive," says Christine Daly, Mount Holyoke's Director of Technology Services. "They just seem to 'get it' very quickly."

Solution

IData began the engagement with a series of requirements gathering meetings to determine how the College's development and financial aid departments were operating and understand their needs for completing the job of scholarship validation. "IData reviewed all of my files and worked closely with me to ensure the solution would meet my needs," says Cappie Glica, Stewardship Officer for the College. "They made a very complicated process very painless. I would recommend them in a heartbeat."

Rather than developing a reporting tool alone, IData proposed a unique solution that would maximize the use of automation to deliver even greater time and labor savings. They created a custom module within Datatel Colleague to enable access to all of the data and functionality of that system. The structure was built on top of the rules engine to maintain and evaluate the scholarship restrictions, match them to the students, and then provide a ranking. The financial aid office then can use that information to decide how to allocate the scholarships. The system also generates baseline letters as MSWord documents that can be personalized to send to students and donors, as desired.

Implementation

The program implementation was managed completely by Ken Dezio of IData. It included technical and user requirements gathering, written documentation of requirements, writing the code, creating test scenarios, and making the program available for testing. Mount Holyoke's Administrative Computing Department benefited from a well-documented system hand-off which included web conferences to walk through the process and view the code to ensure there was nothing that could not be maintained internally. IData also provided a manual to support current and future end users.

Results

"IData delivered exactly what we needed," comments Daly. "Since Datatel is a campus-wide solution, we wanted to maximize its value across multiple functions, such as registrar, development and financial aid in this case. While Datatel provided all of the necessary elements, it took IData to tie them all together. Our stewardship process is much easier now with everything in one place."

"The IData tool works well and is very user friendly," adds Glica. "Since it supports an annual process, each year gets even better as I continue to learn its capabilities and can make refinements myself as needed."

The automated endowed scholarship validation program also enables the College to view the data and analyze outcomes for students over a period of time. The database adds richness for future reporting and analysis as well. For example, as current scholarship recipients become alumnae, the College can reach out to them in a very specific way to solicit their support. According to Brian Parish, president of IData, "The endowed scholarship validation program for Mount Holyoke represents one of the innovative ways IData is helping colleges accomplish new things."

IData Incorporated

IData is a higher education technology consulting and software solutions firm. For information on other innovative services from IData, visit www.idatainc.com. If you would like to talk with IData about custom application development, please contact us at:

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