WHAT IF THE AWARDS FOUND THE STUDENTS?

SESSION 6021
November 13, 2018

PRESENTERS

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NAIT

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OVERVIEW

1. About NAIT

2. Project Goals & Phases

3. The Transformation

4. Major Project Decisions

5. Challenges and Achievements

NAIT | Northern Alberta
Institute of Technology

ABOUT NAIT

~40,000 students in 3 careers each year
- Credit Programs: ~16,000
- Non-Credit: ~14,400
- Apprentices: ~9,600

~ 1,000 Active Awards

~ 4,200 Recipients

~ 8 application periods over 4 terms
- Historical: In a **year**: 8,000 students 29,000 apps
- This year: One **term**: 5,500 students 73,000 apps

THE PROJECT

THE PROJECT

Phase I Authorize & Disburse

Phase II Apply & Evaluate

PROJECT SETTING

- Campus Solutions V9.0

- PeopleTools 8.54 and 8.55

- Project scheduled for 1 year.

- Team of analysts, end users, and managers

- Resources about 40% FTE

- June Go-live

PROJECT GOALS

- **USE PEOPLESOFT**
  We wanted to integrate Scholarship & Bursary processes with student accounts and other features.

- **REDUCE MANUAL PROCESSING**
  Staff were spending 5 minutes per applicant calculating eligibility, GPA, and financial need.

- **IMPROVE THE STUDENT EXPERIENCE**
  Students had to search massive award lists and determine their own eligibility.

- **ACTIVITY GUIDES**
  Collected required information from students efficiently.

APPROACH

- RETHINK THE PROCESS
- DEFINE STANDARDS
- LONG DESIGN PHASE
- BOLT-ON CUSTOMIZATION

CUSTOMIZATION

Students

Activity Guide

Staff

Setup

Evaluation process

Committee evaluation

APPLICATION PERIOD

QUESTION SETUP

Award Question Setup

Institution: NAIT

Question Code: ABORIGINAL

Aid Year: 2018

Criteria Question Setup

Question Short Descr: Aboriginal

Question Text: Are you of Aboriginal Ancestry?

Question Order: 9

List of Values

Personalize | Find | | First 1-7 of 7 Last

Sequence	*Answer ID	Details?	Description	Short Description		
1	NO	☐	No, I am not of Aboriginal ancestry.	No	+	−
2	STATUS	☐	Status Indian/First Nations	Status	+	−
3	NON-STATUS	☐	Non-Status Indian/First Nations	Non-Status	+	−
4	METIS	☐	Metis	Metis	+	−
5	INUIT	☐	Inuit	Inuit	+	−
6	BILL C-31	☐	Bill C-31	Bill C-31	+	−
7	NA	☐	I prefer not to answer	NA	+	−

RESTRICTED AID SETUP

Favorites | Main Menu > Set Up SACR > Product Related > Financial Aid > Awards > Restricted Aid Table

◄ | Restricted Aid Detail 2 | Restricted Aid Org/Contact | Restricted Aid Committees | Award Attributes | **Application Setup**

Institution: NAIT   Northern Alberta Inst. of Tech   **Restricted Aid ID:** 36353
Aid Year: 2018   Agrium Inc. Aboriginal Burs I

▼ Application Period   Personalize | Find | 🔲 | 🏢   First ◄ 1 of 1 ► Last

*Period	Description		
CONT_FALL × 🔍	Fall 2018 Scholarships & Bursaries	➕	➖

Selection Period

Selection Period: CONT_FALL 🔍

▼ Application Criteria   Find First ◄ 1-5 of 5 ► Last

Question 1: Aboriginal ▾   **▼ Criteria Value(s)**
☐ Preference Only

Criteria Value		
Bill C-31 ▾	➕	➖
Inuit ▾	➕	➖
Metis ▾	➕	➖
Non-Status Indian/First Nations ▾	➕	➖
Status Indian/First Nations ▾	➕	➖

Question 2: ▾   **▼ Criteria Value(s)**
☐ Preference Only

▾	➕	➖

RESTRICTED AID SETUP

THE TRANSFORMATION | Students

THE TRANSFORMATION

The old way

The new way

Notifications

Manually Search

No Searching required

Misinterpret Criteria

Eligibility Checks
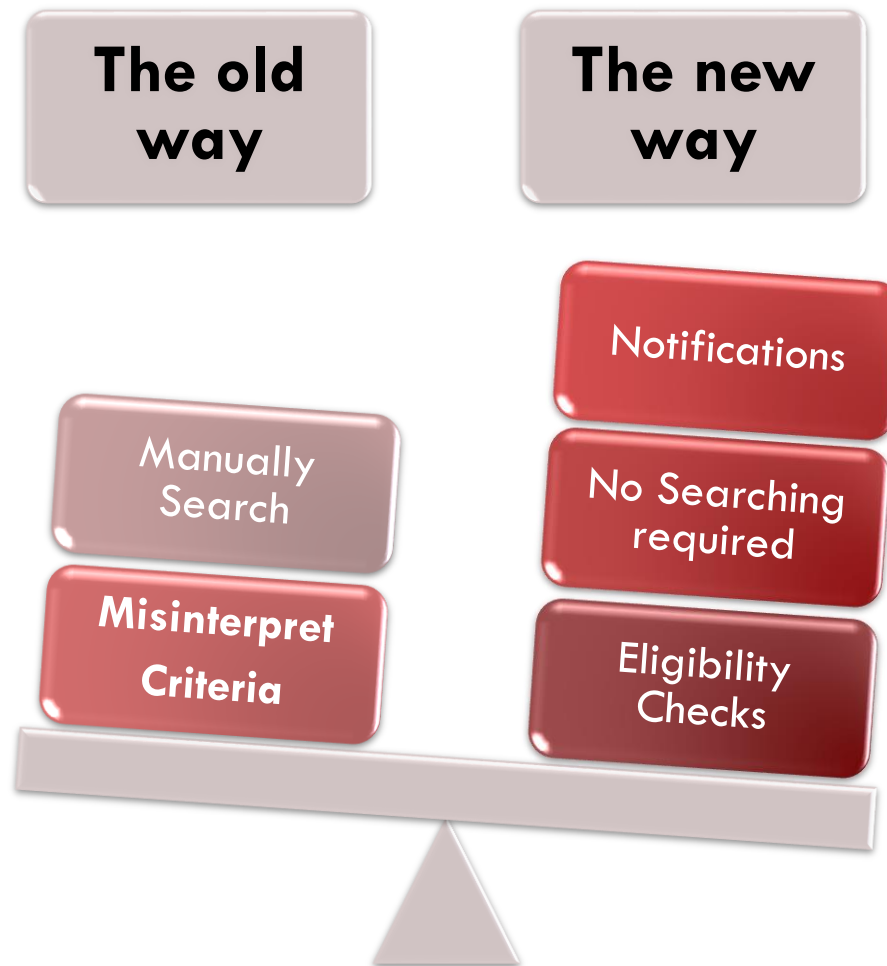
COMMUNICATION PIECES

Dear Bugs Bunny:

As a current NAIT student in good standing, we would like you to consider applying for scholarships and bursaries. To submit an application, complete the task Fall 2017 Scholarships & Bursaries -Deadline 2017-09-15 that you will find in the My Tasks section on your myNAIT portal dashboard. The task will prompt you to complete all the necessary requirements for the application.

We have some helpful tips on our website for you to consider when applying. Please ensure you complete the task before the deadline date. Late applications will not be accepted.

Should you have any questions regarding this process, please contact the Scholarships & Bursaries Office by phone (780.491.3056) or by email (awards@nait.ca).

Sincerely,
Tina Taylor
Scholarships & Bursaries Coordinator
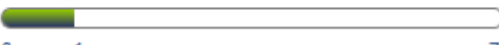
WHAT STUDENTS SEE

WHAT STUDENTS SEE

Student Task WorkCenter

Task Details

Legend

Student ID:200002196

Task Progress
0 1 7

✓ * Introduction
◐ * Student Information
ℹ * Award Type
ℹ * Generate Award List
ℹ Award List
ℹ * Legal Declaration
ℹ * Complete

Bugs Bunny

NAIT Scholarship and Bursaries Application

This form will guide you through the process of finding and applying for scholarships and bursaries at NAIT.

Your answers to the questions in this application will determine your eligibility for scholarships and bursaries. Answer all questions accurately and thoroughly.

Complete each task by selecting **Save** or or **Mark as Read**. After completion, the **Next** button is available to proceed to the next task.

You can find out more about Scholarships & Bursaries, including our contact information, on our website.

WHAT STUDENTS SEE

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Student Information

Award Type

Generate Award List

ard List

Legal Declaration

Complete

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

Bugs Bunny

Please validate the information below is correct before proceeding with your application.

Confirm Your Personal Information

Legal Name	Bugs Bunny
Citizenship	Canadian Citizen
Address	1 Rabbit Hill Rd
	Edmonton, AB
	T7X3K2
Email	SaSupport@nait.ca
Phone	780/777-7777
Gender	Male

Confirm Your Program Information

| | Digital Media and IT |
| | Business Analyst |

☑ **Data is correct**

> Save

Click here to update your personal information.

If you have questions about updating your personal information or program, please contact the Student Service
Center.

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Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

Bugs Bunny

Select the types of awards for which you want to apply. You must select at least one type to proceed

Do you want to apply for Scholarships?

Scholarships are awarded to students who demonstrate academic achievement or high grades and are enrolled in 80% or more of a full course load. Other criteria, such as volunteer work or demonstrated leadership, may also be considered.

| No ▾ |

Do you want to apply for Bursaries?

Bursaries are awarded to students who have a proven financial need, are maintaining satisfactory academic standing and are enrolled in 60% or more of a full course load.

If you choose to apply for bursaries, you will be asked to provide details about your income and expenses for your academic term.

| Yes ▾ |

WHAT STUDENTS SEE

◀Previous Next▶ Exit

⚙ ≪

🔄 ⚙▼

Legend

▼

4 9

▼ **Application Questions**

Please answer all of the questions below.

Are you a returning NAIT alumni or the child of a NAIT alumni? Please provide the name of your previous program and year of graduation and/or your parent's name, program and year graduation.

| Yes ▼ |

Explanation:

| Mom |

Does at least one of the following statements apply:
- You have lived in Alberta all your life
- One parent/legal guardian has lived in Alberta at least 12 consecutive months immediately prior to you commencing post-secondary studies
- You have lived in Alberta for 12 consecutive months immediately prior to commencing post-secondary studies
- Your spouse is an Alberta resident and you married before starting post-secondary studies

| No ▼ |

Do you want to apply for awards offered by Alberta Student Aid? If you answer "Yes", your application information will be forwarded to Alberta Student Aid for review if you are nominated for their awards.

| Yes ▼ |

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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Bugs Bunny

Save

▾ General Bursary Questions

Marital Status	Single ▾
How many children do you have under the age of 18?	1
How many of your children under the age of 18 live with you?	0
While attending NAIT, my housing situation is	I live away from my parents ▾

Please describe why you consider yourself to be in financial need. Include any exceptional or extenuating financial circumstances you are facing.

Here's a description of why I have financial need.

2450 characters remaining

▾ Expenses

Tell us about your expenses while you are attending NAIT. Enter $0 if a section is not applicable to you.

Lump Sum Expenses

For the current academic period (September to December), list any one-time or exceptional expenses you will have.

Tuition and Fees   Tuition & Fees will be included from your account

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Legend

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WHAT STUDENTS SEE

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Legend

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2450 characters remaining

▼ **Expenses**

Tell us about your expenses while you are attending NAIT. Enter $0 if a section is not applicable to you.

Lump Sum Expenses
For the current academic period (September to December), list any one-time or exceptional expenses yo will have.

Tuition and Fees   Tuition & Fees will be included from your account

Computer Related Amount

Books and Supplies

Exceptional One-Time Expenses   ⓘ

Monthly Expenses
List the amount you are spending *each month* while you are attending NAIT.
NAIT uses the **Standardized Living Allowance** as defined by Alberta Student Aid to calculate a total for food, clothing, personal, transportation, rent/mortgage and utility expenses based on your marital status and living circumstances. For more details, visit the Alberta Student Aid web site.

Standard Living Allowance   Included for you: food, clothing, personal, transportation, rent/mortgage, utilities

Childcare

Child Support or Alimony

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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▼ **Resources**

Tell us about your income and financial resources while attending NAIT. Enter $0 if a section is not applicable to you.

Lump Sum Resources

For the current academic period (September to December), list the total amount of funding you have confirmed that you will receive.

Student Loans from Alberta   Alberta student loan amounts are included automatically.

Student Loans from provinces other than Alberta

Line of Credit

Savings

RESPs (cashed amount only)

Family contributions towards tuition, fees, or books

Spouse/Partner contribution towards tuition, fees, or books

Third Party Funding (i.e. employer)   ❶

Indigenous and Northern Affairs Canada / Band Funding   ❶

Monthly Resources

List the amount that you are receiving each month while you are attending NAIT in addition to the totals previously listed.

Income (take-home pay)

Legend

9

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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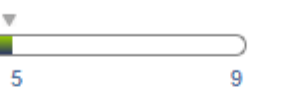
Bugs Bunny

An answer is missing on the Bursary Questions page.
Return to the **Bursary Questions** page and review your answers. You must answer **all** the questions on this page.

Please correct all the issues listed above before proceeding.

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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Bugs Bunny

Review your answers

After completing this step you won't be able to changes your answers on the **Questions** pages. Take this opportunity to review and finalize your responses before proceeding.

To proceed, select **Review Complete**, **Generate**, and then click **Next.**

☑ **Review Complete**

Generate Award List

WHAT STUDENTS SEE

Sample Student

Title	Number of Awards	Value	Details	Additional Material	Status
Argus Machine Co. Ltd. - Kranenburg & Hallett Award - MEC II	2	$1500.00	Details		Ready to Submit
Arlene Huhn Scholarship	1	$1000.00	Details		Ready to Submit
Corporal Bryce Keller M.M.V. Memorial Bursary	1	$1200.00	Details	Additional Material	Ready to Submit
Hong Kong-Canada Business Association Award	1	$500.00	Details	Additional Material	Incomplete
Jason Lang Scholarship Winter	Varies	$1000.00	Details		Ready to Submit
Métis Scholar Awards at NAIT	30	$3000.00	Details	Additional Material	Incomplete
NAIT Alumni Scholarship Endowment Fund - Winter	6	$2000.00	Details		Ready to Submit
Nova Chemicals Limited Award	1	$1000.00	Details		Ready to

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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Legend

7   9

Award additional material

Métis Scholar Awards at NAIT

Students must submit a letter of at least 400 words outlining their experience with the Métis community and/or how this award will help support their future aspirations.

Tip: Use the corner arrows to enlarge the typing area.

Please upload proof of Metis ancestry. For additional information about the Metis Scholar Awards please visit http://www.rupertsland.org

| Attachments | Audit | |

Attached File	Description	
		−

Add Attachment

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15

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Bugs Bunny

Make sure your application is complete and final before saving this step.

Read the declaration below. To agree, click the checkbox then Save.

I declare:

- That I have answered all questions applicable to me and that all information is true and complete;
- That I will notify the Scholarships & Bursaries Office if I withdraw from full-time status, receive other external awards, or otherwise change my student status;
- That if I receive a scholarship/award, the amount will be disclosed to the Student Finance Board and to Canada Revenue Agency;
- That I consent to the use of the information provided herein and also use of academic information forming part of my student record, for the purposes stated above.

☑ **I accept the above conditions**

Date: 07/06/2018

Save

WHAT STUDENTS SEE

Fall 2018 Scholarships & Bursaries -Deadline 2018-09-15   ◀Previous   Next▶   Exit

Legend

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Bugs Bunny

Your application has been submitted.

Recipients will be notified via email 6-8 weeks after the application deadline.

Visit the Scholarships & Bursaries web site to find out more about other sources of funding for students.

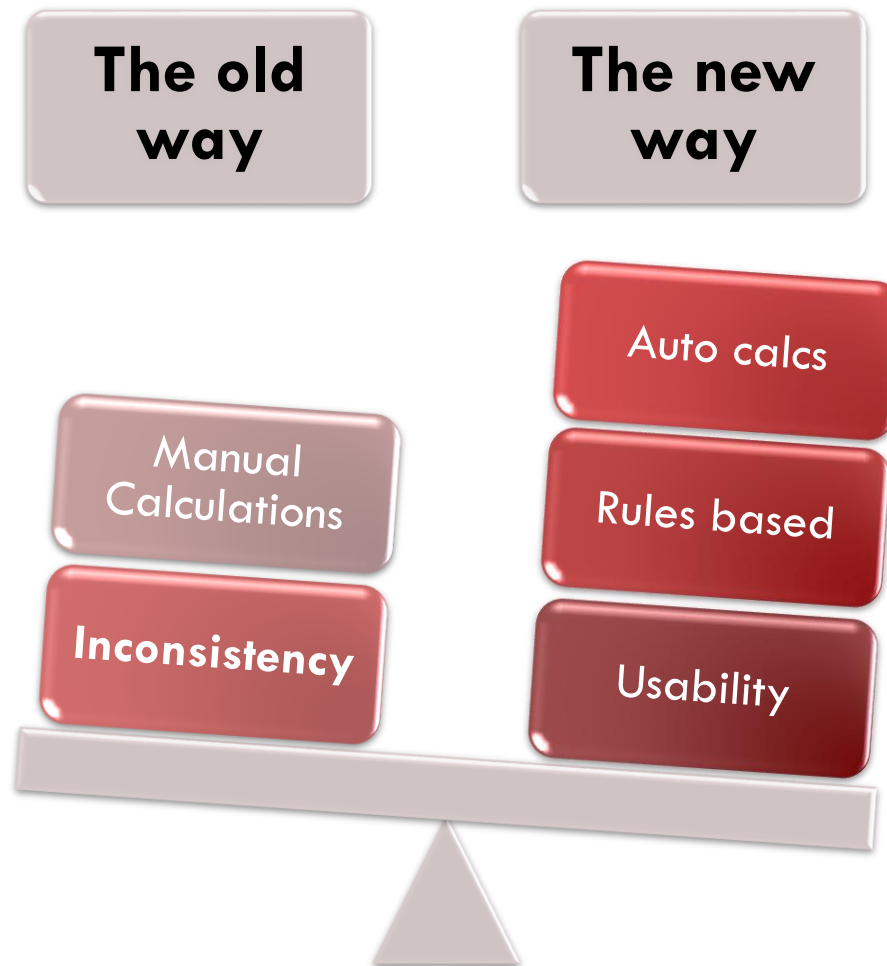Click **Finish** to complete and close.

Finish

THE TRANSFORMATION | Staff

THE TRANSFORMATION

The old way

The new way

Auto calcs

Manual Calculations

Rules based

Inconsistency

Usability

WHAT STAFF SEE

NAIT S&B Evaluation

Institution: NAIT	**Aid Year:** 2018	**Restricted Aid ID:** 36076	
Award Name:		**Award Type:** Bursary	
Item Type: 000000036076			

Awards Available: 2

Admin Comments: Criteria changed to include third & fourth year students as per Cliff Cameron 12/10/15

Award Amount: 1000.00000

Selection Period: CONT_FALL

Assessment Status: Unassessed ▼

Criteria: Available to first, second, third and fourth year aboriginal students enrolled in any full-time program at NAIT. Awarded on the basis of financial need and satisfactory academic achievement.

Filter by Eval Status: [▼]

Personalize | Find | View 100 | 🔲 🏠 First ◀ 1-10 of 149 ▶

Application Data | Academics | Personal Info | [▦▶]

Student ID	Student Name	Status	Disburse Award	Evaluate	App Period	Program	Plan	Sub Plan	Course	Level	Community Rating	Financial Rating	Total Award Amounts	Rank Average	Comment for Student	Comment for A
2	Dana C	▼		Evaluate	CONT_FALL	BUS	BUS			01			2172.50			
2	James J	▼		Evaluate	CONT_FALL	CIV	CIV			02			-709.50			
2	Kim B	▼		Evaluate	CONT_FALL	BBA	BBA	ACCOUN		01			3357.75			
2	Deanna Smith	▼		Evaluate	CONT_FALL	BBA	BBA	ACCOUN		03			128.50			
2	Shandel F	▼		Evaluate	CONT_FALL	BUS	MAN			02			4680.00			
2	Shannal L A	▼		Evaluate	CONT_FALL	BBA	BBA	ACCOUN		04			5261.50			
2	Morgan H	▼		Evaluate	CONT_FALL	MLT	MLT			01			-1064.25			
2	Erin C	▼		Evaluate	CONT_FALL	BBA	BBA	HRMGMT		04			1075.50			
2	Lois L	▼		Evaluate	CONT_FALL	EMG	EMG			01			-3039.38			
2	Jacueline L	▼		Evaluate	CONT_FALL	BBA	BBA	FINANC		03			2031.38			

WHAT STAFF SEE

Student Name	Status	Entrance Rating	Burs Prior Term GPA	Burs 2-Term GPA	FA Load Current	Current Term Progress	Transcript
D▮▮▮ ▮▮▮▮▮▮▮	▼		83.75	85.00	60%	9.000	Transcript
J▮▮▮▮ ▮▮▮▮▮	▼		88.24	87.41	TBD	24.000	Transcript
K▮▮ ▮▮▮▮▮	▼		63.67	63.67	80%	12.000	Transcript
D▮▮▮▮ ▮▮▮▮	▼		60.25		60%	9.000	Transcript
S▮▮▮▮▮ ▮▮▮▮▮▮	▼		53.00	50.14	80%	12.000	Transcript
S▮▮▮▮▮ ▮▮▮▮▮▮ ▮▮▮▮	▼		64.33	63.00	60%	9.000	Transcript
M▮▮▮▮ ▮▮▮▮▮	▼		95.92	96.33	TBD	16.500	Transcript
E▮▮ ▮▮▮▮	▼		77.80	73.00	100%	15.000	Transcript
L▮▮ ▮▮▮▮▮▮	▼		89.67	87.67	TBD	9.000	Transcript
J▮▮▮▮▮▮ ▮▮▮▮▮	▼		15.67	22.00	60%	9.000	Transcript

Personalize | Find | View 100 | First 1-10 of 149

WHAT STAFF SEE

							Personalize	Find	View 100			First	1-10 of 149

Academics | Personal Info | |

Student Name	Status	Birthdate	Gender	Marital Status	Number of Children	Citizenship	ABORIGINAL	Details
D	▼		M	Married	3	Canadian Citizen	METIS	
J	▼		M	Married	2	Canadian Citizen	METIS	
K	▼		F	Single	1	Canadian Citizen	STATUS	
D	▼		F	Married	1	Canadian Citizen	STATUS	
S	▼		F	Married	4	Canadian Citizen	STATUS	
S	▼		F	Married		Canadian Citizen	STATUS	
M	▼		F	Married		Canadian Citizen	METIS	
E	▼		F	Single	2	Canadian Citizen	STATUS	
L	▼		M	Married	2	Canadian Citizen	METIS	
J	▼		F	Single	2	Canadian Citizen	STATUS	

CHALLENGES AND ACHIEVEMENTS

CANADA ALLIANCE   12-14 NOVEMBER 2018

CHALLENGES & LESSONS LEARNED

- Setup issues & exceptions

- Communication across business owners and teams

- Plan for some extra effort in Year One

- Stay flexible

- Unexpected volume

ACHIEVEMENTS

- Massive uptake by students

- System had the flexibility to work through issues

- Potential for the future

- Automated Calculation

CONCLUDING THOUGHTS

ANY QUESTIONS?

SUMMARY

- Success!

- Training wheels

THANK YOU!

CANADA ALLIANCE   12-14 NOVEMBER 2018