

Senate Efficiency Review (SER)

**A brief overview
of
Student Funding Administration**

**SER Advisory Board
19 March 2015**

Student Funding Administration

Overall aims

To deliver a link to funding opportunities and processes within the applicant and student journeys to provide the best possible experience, attract the best and the brightest, and retain our students;

To assure financial control across funds managed by the University;

To maximise the benefit of the scholarship investment for the University and its students.

Student Funding Administration Tribal partnership

The software being used is provided by Tribal and the platform is SITS:e-Vision.

The system will be available online.

Stuart Pearce is our expert Tribal lead. He is advising the Project Team as well as helping to build developments. Stuart works onsite as well as offsite.

Student Funding Administration Tribal partnership

The software being used is provided by Tribal and the platform is SITS:e-Vision.

The system will be available online.

Stuart Pearce is our expert Tribal lead. He is advising the Project Team as well as helping to build developments. Stuart works onsite as well as offsite.

Student Funding Administration Project Team

The project is jointly sponsored by the Academic Registrar (Ester Ruskuc) and the Finance Director (Andy Goor).

The Project Manager is Gail Davidson (on 100% secondment from Registry).

The Team Leader until January 2015 was Janine Ferguson (Registry) and is now Michele Goodwin (Registry).

The ITS developer is Gerardo Olaez.

The Units providing SMEs are Finance (Karen Laing, Kathryn Davidson), ITS (Karen Porteous) and Registry (Alice Carradice, Sam Dixon, Michele Goodwin, Morag Mayes).

Student Funding Administration Project timeline

The SER programme intends to deliver all of its projects through a series of waves over two years from November 2014 to December 2016.

Fund Wave One was intended to finish by 30 June 2015. With the late start of all SER projects the first delivery dates have been pushed forward by a month so Wave One will deliver by 30 July 2015.

Wave Two will finish by December 2016.

Student Funding Administration

Identifying scholarships

A master list of over 1,000 known scholarships has been compiled from

Registry
Finance
Student Services
Development

The spreadsheet has been sent to Schools, Music Centre, Student Services, Sports Centre, etc. so they can provide the criteria for awards.

Student Funding Administration

Rules driven software

The project will identify known scholarships and will code these appropriately to the general ledger codes used by Finance for financial allocations.

Students will be able to apply online from a list of available scholarships and a workflow will allow selectors to make and confirm decisions to students.

Rules will determine which scholarships students are eligible for at the application stage.

Rules will direct the allocation of the total amount through the general ledger and on to student statements.

Student Funding Administration

Project deliverables

The project deliverables include:

- establishment of a golden source for every University administered fund;
- provision of an online funding approvals process including an application form;
- Provision of a role group driven Fund Management dashboard for managerial oversight of funds;
- Functionality to provide access to funding information that is relevant, timely and accurate

Student Funding Administration

Project objectives and benefits

The objectives of the project provide for a variety of tangible and other benefits including the ability to:

- Allow schools, applicants, parents, students, graduates, staff and other interested parties ease of access to the funding information that is relevant to them;
- Offer timely information about funding that will give confidence to offer holders that will lead them to make St Andrews their firm choice;
- Offer fit for purpose funding information to retain and attract talented graduates who wish to pursue postgraduate studies at St Andrews;

Student Funding Administration

Project objectives – cont'd

- Offer funding opportunities to current students that will enhance their academic experience;
- Offer access to welfare funding information that will allow students who are in need to continue their studies at St Andrews;
- Assure appropriate financial control;
- Eradicate duplication of effort;
- Integrate with other systems and developments such as web project and SER;
- Provide secure management information required to support planning and decision