Introduction to Our Implementation Recommendations

The campus community is enthusiastic about launching a major scholarship initiative “Access Illinois: Ensuring Access to the Illinois Experience”, and there is significant agreement across units about the optimal shape and focus of the program.

- We are convinced of the pressing need for greater availability of scholarships (and scholarships of a different type than in the past) to ensure access for qualified students, selectivity and competitiveness in our student population, and the quality of the institution, and we concur that assertive scholarship fundraising is a critical goal for the campus.

- We are willing to dedicate and deploy extant resources (i.e., time of our leaders and team members) to ensure the success of fundraising for scholarships; we also hope to expand capacity in this area through complete engagement of the regional gift officers who are now fully assigned to the Urbana campus.

- We recognize that a new model for undergraduate scholarships is critical for our success as a selective, land-grant university, with the following parameters:
  - Scholarships should be key aids in recruitment, to assist in securing the targeted freshman class.
  - Scholarships should be four-year awards, to the extent possible, to allow students to select/attend Illinois, particularly students whose financial background would not otherwise permit them to attend Illinois.
  - Scholarships should be awarded as close to the time of admission as possible, to most effectively influence college selection decisions.
  - The greater the flexibility in scholarship gifts, the more effectively the institution can use resources for recruitment scholarship needs.
• We concur that unmet need is a pressing concern in maintaining access and diversity in financial background that is fundamental to the land-grant mission, as are scholarships that focus on reaching high ability students from all income backgrounds.

Critical Need for Campus-Level Scholarships for Undergraduate Students

Many have inquired why a campus-level scholarship fund is needed, rather than focus on fundraising for scholarships primarily at college or departmental levels. One of the most important points of the approach recommended in this report is that our success as an institution will rest on a new model of undergraduate scholarships, a model that provides scholarship resources for recruitment through graduation. Consider the following key points:

• 1,800 students (about 25% of the freshman class) enter Illinois each fall semester through the Division of General Studies, not affiliated with any college because these students move into all undergraduate colleges after 2-4 semesters at Illinois. DGS students include the full-range of our population -- students with significant financial need, first-generation college students, high-achieving honors students, students from underrepresented backgrounds. With only college- and/or departmentally based scholarships for recruiting our freshman class, fully one-quarter of the freshman will not be accorded full access to the institution.

• Only approximately 60% of our undergraduates earn their degrees from the college they entered; in addition, many students change their major program -- within the same college -- of study at least once during their undergraduate years. If college- or department-based scholarships are the tool for recruiting students to Illinois, what happens when a student who selected Illinois based on a recruitment scholarship transfers from Engineering to LAS, or from LAS to AHS? Given mobility of our students within the institution, particularly in some fields, increased availability of campus-wide scholarships is fundamental for our success. When we recruit a student to Illinois, we assume a commitment to retaining each student through graduation, whether s/he graduates in engineering or business or chemistry. Many undergraduates are less strongly affiliated with their college of entry than with the University of Illinois, and we need to recruit and retain them with this in mind. To be maximally effective, recruitment scholarships, particularly those awarded on the basis of financial need, must be linked to the student, not the college of entry.

• There are major donors who will work directly with the Chancellor or President in developing their scholarship program. The passion of some donors, interested in making an impact on a large scale, is helping undergraduates obtain an Illinois degree, independent of departments, programs or majors. A campus-wide program that can attract the interest, attention and support of such donors and may enhance
fundraising on a large scale. A campus-wide program can function as a complement to
departmental or college-based scholarship funds.

- Any actions that we can take to improve the efficiency and timeliness of our admissions-
to-financial aid award letter processes will benefit prospective students and the
institution. Admissions and Financial Aid have a cumbersome task in dealing with
decentralized undergraduate colleges, with varied priorities and criteria. Campus-wide
scholarships that can be dedicated to students with unmet need in every unit, including
the Division of General Studies, can be efficiently awarded as close to the time of
admission as possible, by the Office of Financial Aid. It may be possible to tentatively
award need-based scholarships in advance of complete financial (FAFSA) information
(i.e., based on high school characteristics and/or other demographic factors); such a
strategy could significantly enhance student recruitment efforts, if/when the availability
of need-based scholarships is increased.

- To date, despite widespread awareness of the rising urgency of the situation and
measurable impact on key indicators, we have not appreciably advanced the
institution on the critical agenda of undergraduate scholarship fundraising. The
continued success of the institution will rest on our effectiveness in securing recruitment
scholarships that allow us shape the freshman class. Indeed, we need "all hands on deck"
to advance swiftly -- deans and their advancement teams, OVCIA personnel, UIF
leadership and staff, Provost, Chancellor, President. The time is now to focus fundraising
efforts on our core values of access and excellence, both within and beyond our specific
academic units, rapidly increasing the availability of scholarship funding for students
admitted to Illinois.

**Implementation Recommendations (based on questions from our charge letter)**

1. How can we design a scholarship program that serves the general campus as well as
   specific colleges?

2. Should the program be based primarily on need or on some combination or need and
   merit?

Our discussion revealed convergence across units on the importance and value of a
general, campus-wide scholarship fund to address unmet need in undergraduates recruited to all
academic units (see discussion, above). Furthermore, our discussion revealed divergence and
unique features in the priorities of different undergraduate-serving colleges. With these points in
mind, we recommend the following for the *Access Illinois* initiative:

a. A **campus-wide scholarship fund focusing specifically on need** should be established
to aid in the recruitment of freshmen in all colleges serving undergraduates.
b. Each college serving undergraduates should develop a scholarship fund designed to meet specific college-level recruitment priorities (e.g., scholarships for the highest achieving students and/or students from underrepresented populations).

c. Graduate and professional units may also wish to focus fundraising efforts on scholarships, designed to meet specific unit priorities.

We believe that Access Illinois can serve as an umbrella for the full scholarship initiative, both the campus-wide effort and the college-specific components. Students in all undergraduate-serving units will receive support from the general, campus-wide scholarship fund (see 5, below). For maximum efficiency and optimization of available funds, we recommend that Access Illinois scholarships awarded from both the general and college-specific funds be coordinated through the Office of Student Financial Aid, with input from the Office of Undergraduate Admissions and college-level admissions officers. Academic units will direct the use of their college-specific funds, identifying scholarship recipients based on college-specific recruitment priorities, with the Office of Student Financial Aid coordinating award assignments. The Office of Student Financial Aid will direct the use of campus-wide funds (based on need), ensuring that awards be made to students with unmet financial need, on a consistent/formula basis that is blind to college of enrollment. Colleges will be notified of students in their units receiving aid from the general scholarship fund. Enhanced, coordinated stewardship efforts will be vital. As the Access Illinois program expands and succeeds, the need to additional personnel resources for awarding scholarships (OSFA) and ensuring stewardship may be needed.

Establishing both campus-wide and college-specific components of the Access Illinois initiative has several advantages:

- it addresses need and merit, pressing concerns for maintaining access, affordability and achievement;
- it incentivizes unit involvement to address financial need for undergraduates across the campus;
- it allows colleges to design unit-specific scholarship programs to meet unique priorities; and
- it provides the opportunity to meet donor interests and priorities, whether focused on need/campus-level scholarships, or college-level scholarship priorities.

3. How can we incentivize colleges to work on general campus scholarship funding? Do we need metrics for college advancement officers?

4. Do we need targets or metrics for the colleges during this initiative? If so, should the targets be monetary or time based?

One of the questions in the proposed model for Access Illinois is whether our Deans and our college-based advancement professionals will talk openly with donors about opportunities for giving to either/both the campus-wide scholarship fund (focused on unmet need and benefitting undergraduates in all colleges) and college-specific scholarship programs (focused on
college priorities and directed to students within each college). The working team confirmed that:

• As an institution, we are ready to assertively raise funds for scholarships, both campus-wide and college-specific, given the pressing needs of our students and the importance of scholarships to meeting our aims in student recruitment.

• We will be more successful with greater numbers of donors if we listen and respond to their priorities and interests in scholarship giving; having both campus-wide (focused on need) and college-specific (to address college priorities) programs will be an advantage in responding to and matching the interests of our donors.

• We share a commitment to ensuring the success of both campus-wide and college-specific scholarship efforts, and we are willing to be evaluated on our effectiveness in both areas.

• We will monitor our success in scholarship fundraising each year through an annual report that summarizes our effectiveness in raising funds for undergraduate scholarships through the Access Illinois initiative, both the campus-wide and college-specific funds. In the event that the annual report reveals that we are not achieving the aims outlined above (i.e., securing scholarship funds focused on addressing need), we will refine our approach.

As a strategy to ensure full engagement and effective tactics, the working team recommends that each college serving undergraduates be required to develop a brief Scholarship Fundraising Plan.

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<tr>
<th>Step 1: Describe how your unit will enhance resources for the campus-level scholarship fund.</th>
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<td>1 a. How will you utilize annual giving to enhance campus-level scholarships?</td>
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| Step 4: Establish a one- and three-year goal for funds to be raised by your unit for college-
specific scholarships. These goals will be considered working targets.

4 a. One-Year Goal
4 b. Three-Year Goal

Step 5: Review, identify and summarize major donor prospects you aim to reach in the next one- to three years to discuss scholarship opportunities, both current and new prospects

Step 6: Schedule a meeting with VCIA Schroeder and VCAA Wheeler to discuss your plans, identify campus and Foundation resources that may be of assistance, and review VCIA metrics that will be used to monitor progress toward our aims

Given the straightforward outline for these brief scholarship plans, a due date of February 2011 for these plans should be feasible, with follow up meetings to be held in February 2011. The intent is to achieve a sound planning and evaluation framework and buy-in from each academic unit serving undergraduates about their plans for full engagement in the Access Illinois scholarship initiative by the end of January 2011, in order to expediently launch the effort with a sense of collective vision toward shared goals.

5. How do we allocate unrestricted scholarship funds in a way that helps all colleges serving undergraduates?

Given that (a) the campus-wide scholarship fund will be dedicated to undergraduate students in all colleges as a tool for reducing unmet financial need, and (b) all colleges serving undergraduates will participate in raising gifts for this fund, it will be critical that students in all colleges enrolling undergraduates are served by the program. Because all colleges serving undergraduates enroll many, many students with unmet financial need, this aim will be readily achieved.

The Office of Student Financial Aid (OSFA) will award scholarships from the campus-level fund. OSFA will apply established criteria to award need-based aid based on a consistent formula that is college-blind. If the Access Illinois initiative reaches the level where unmet need is no longer present across all undergraduate-serving colleges, this recommendation will be revisited. The Office of Financial Aid will produce an annual summary of scholarships awarded through the general campus fund, and disseminate this annual report to the Chancellor, Provost, Council of Deans and OVCIA.
Finally, the working group discussed potential benefits of establishing a standing *Access Illinois Scholarship Task Force*, to (a) assist in implementation decisions not yet anticipated or determined, (b) review annual reports, and (c) provide oversight of program effectiveness and impact, as well as other matters not yet anticipated.

**Conclusion: A Bold and Visible Plan of Action**

The working group concurs that the agenda before us is compelling; increasing the availability of scholarships is essential to maintain access and excellence in the students we recruit to Illinois and ensuring that our students have the resources needed to be retained through degree completion. We fully support a new model of undergraduate scholarship fundraising and assignment, a model that uses scholarships to recruit (rather than reward) students and views scholarships as attached to students rather than connected to academic units. We are also certain that we can succeed in the efforts outlined here.

If the urgency of the present circumstance calls for bold and highly visible action, our institutional leadership could consider strengthening the *Access Illinois* campus-level scholarship fund by focusing attention on scholarship giving, through one or more of the following strategies:

- **Direct a modest portion of every gift received by the campus to Access Illinois, with the consent/approval of donors.** With effective communication about the importance of undergraduate scholarships to maintaining our mission, many donors, alums and friends may be enthusiastic about dedicating a small portion of every gift toward the aims of *Access Illinois*, making an Illinois education affordable for talented students independent of their financial backgrounds. The working group recognized the challenges of such an approach, namely that some donors may not support even a modest assessment that directed a portion of their gift to a scholarship fund.

- **Assign all unrestricted gifts/funds to scholarships.** Another method to increase resources for *Access Illinois* would be to devote 100% of all unrestricted gifts received by the UIF to this program. Unrestricted endowments within the Foundation could also be used to strengthen *Access Illinois*. Funds currently directed to the discretion of the President and/or Chancellor could be similarly assigned to *Access Illinois*. The Foundation could include *Access Illinois* as a giving option on every direct mail and web-based platform. This approach has the advantage of a tangible demonstration that scholarships are the highest priority for our institutional leadership.
• Request additional/optional gifts to Access Illinois in conjunction with every major gift received. Advancement teams could strengthen support for Access Illinois by encouraging every donor cultivated/solicited to make an additional gift to Access Illinois. For example, each donor could be asked to make an additional gift of 5%-20% of their original gift to support Access Illinois. Each individual donor could decide whether and what level is appropriate for their unique situation. This approach has the advantage of affording donors control of their philanthropy, and makes solicitations for Access Illinois an integral component of our broader development strategy.