



Grants Coffee Talk:

Building Better Evaluation Processes



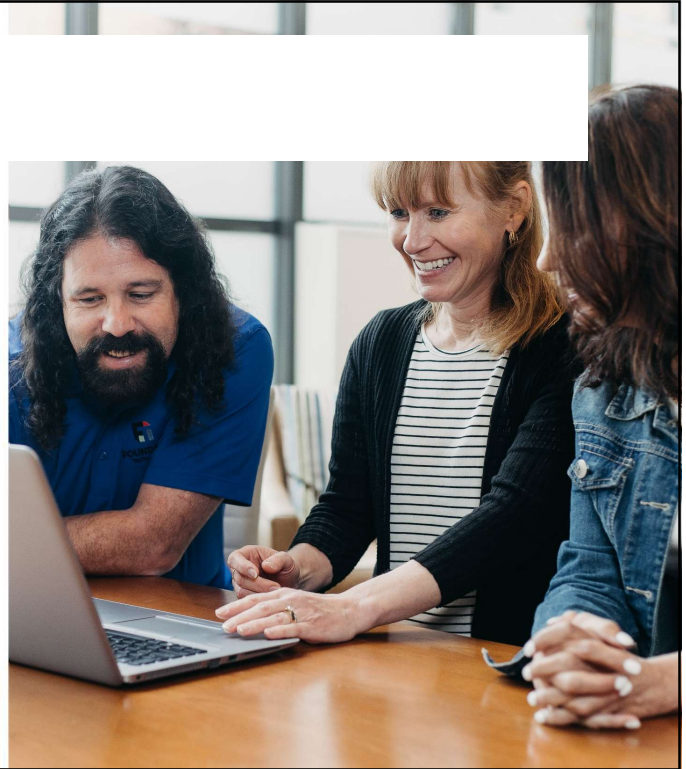
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Coffee Talk Expectations

- Who gets the conversation started? **Foundant**
- Who shares experience, advice, and challenges? **You! (You are the experts)**
- Who deals with all the questions and virtual "raised hands"? **Foundant**
- Who participates in an open forum to share experiences and learn from one another? **You!**
- **This discussion does *not* need to revolve around any particular platform.**



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Students First Consulting: Transforming Scholarship Programs

- We're the only consulting firm **focused exclusively on scholarship programs.**
- We believe that **scholarships can change lives!**
- Our team has a combined **30-plus years' experience in scholarship philanthropy.**
- Our solutions are **strategic, student-centric, and designed to transform your program.**
- We're committed to **creating genuine, positive change for students - join us!**



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Agenda

The Case for Better Evaluation

Anatomy of an Effective Rubric

Best Practices in Selection

Open Discussion

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Terminology

Selection

The **process** by which you select your recipients from your applicant pool.

Evaluation

The **stage** where you actually assess those applicants.

Evaluation Form

A **tool** you use to evaluate applicants' strength of fit, either on paper or in software; may house rubric or be only rubric.

Rubric

The **technical tool** you use to evaluate each applicant, including indicators you're looking for, help text about those indicators, and/or a mechanism to score.



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Poll #1

How many individual scholarships do you manage?

- Less than 5
- 5-10
- 10-50
- 50-100
- 100+

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The Case for Better Evaluations

- IRS Compliance for Scholarships
 - “Objective and non-discriminatory”
 - “Related to the purpose of the scholarship”
 - “Applied equally to all applicants”
 - Donor participation and influence
- Support for donor intent
- Guidance for scholarship committees
- Selecting more mission and values-aligned recipients



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Important Note:
eligibility criteria & selection criteria are
different!

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Anatomy of an Effective Rubric

Selection Criterion Name

A brief description of the selection criterion for evaluators to use as general guidance.

- 4 - Indicator.
- 3 - Indicator.
- 2 - Indicator.
- 1 - Indicator.

Criterion is aligned with the goals of the scholarship fund and donor intent.



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Anatomy of an Effective Rubric

Selection Criterion Name

A brief description of the selection criterion for evaluators to use as general guidance.

- 4 - Indicator.
- 3 - Indicator.
- 2 - Indicator.
- 1 - Indicator.

1-2 sentence description of the criterion.



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Anatomy of an Effective Rubric

Selection Criterion Name

A brief description of the selection criterion for evaluators to use as general guidance.

- 4 - Indicator.
- 3 - Indicator.
- 2 - Indicator.
- 1 - Indicator.

Even-point scoring scale to move scores away from the middle.



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Anatomy of an Effective Rubric

Selection Criterion Name

A brief description of the selection criterion for evaluators to use as general guidance.

- 4 - Indicator.
- 3 - Indicator.
- 2 - Indicator.
- 1 - Indicator.

Clear indicators for each point on the scale.



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Anatomy of an Effective Rubric

Selection Criterion Name

A brief description of the selection criterion for evaluators to use as general guidance.

- 4 - Indicator.
- 3 - Indicator.
- 2 - Indicator.
- 1 - Indicator.

Not pictured:

Application information that directly aligns with and provides information for scoring this criterion.



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Example

Commitment to Community

The goal of this criterion is to measure how the applicant views themselves as a part of something larger, such as a community, group, or cause. Use the student's list of activities and "Community Involvement" short answer to assess this criterion.

- 4** - Clearly identifies a community or cause. Provides strong, specific examples of consistent involvement (e.g., leadership, organizing, long-term service). Reflects on personal impact.
- 3** - Identifies a community or cause with meaningful participation (e.g., regular involvement, support roles). Some reflection on contribution, though examples may be less detailed.
- 2** - General sense of belonging with limited or vague participation. Involvement is occasional or unclear; little reflection on impact.
- 1** - No clear connection to a community or cause. Minimal or no examples of engagement or contribution.



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Best Practices in Evaluation

- Train your reviewers
- Setup your rubrics effectively
 - Aligned with scholarship goals
 - Well-described
 - Even-point scoring system
 - Clear indicators
 - Aligned with application
- Standardize across opportunities



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Poll #2

How are/were your selection criteria determined?

- A donor/donors name the desired criteria for the scholarship.
- We provide a list of criteria from which the donor(s) select.
- We discuss desired impact with the donor(s) and staff set the criteria.
- A mix of the above.

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Poll #3

How do you structure your selection process?

Select all that apply.

- We do not use a formal scoring rubric to select scholarship recipients.
- We have unique scoring rubrics for each opportunity.
- We use one scoring rubric across all opportunities.
- Other

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Poll #4

Select the option that best describes if/how you use scholarship software to support selection:

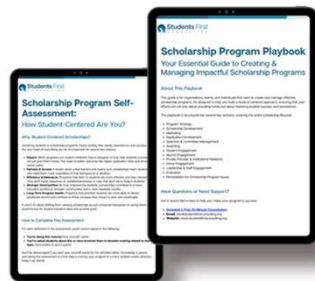
- We do not use scholarship software to support selection.
- We have one committee; they do not score in our software.
- We have one committee; they score in our software.
- We have multiple committees; all score in our software.
- We have multiple committees; some score in our software and some do not.

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Empower Your Scholarship Program: Next Steps with Students First Consulting

FREE Scholarship Program Tools: Grab Our Self-Assessment & Program Playbook

Evaluate your program. Build in proven practices. Maximize your impact.



Grab your
free tools!



- **Identify areas for growth** across critical aspects of the scholarship lifecycle.
- **Get best and proven practices** for program improvement.
- **Build a roadmap** to turn those insights into tangible, positive, student-centric changes.

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