

PROCESS FOR A COBSS BURSARY

OFFICE-SEPT/OCT/NOV

- initial call from donor
- send contract to donor
- donor returns contract with cheque
- set up file in office
- add new bursary to master excel sheet
- set up account in Simply Accounting
- receipt cheque with appropriate receipt (general/gaming/tax)
- send receipt to donor with "thank you" from COBSS
- complete bank deposit
- deposit money to bank
- compile list of all bursaries from excel sheet & submit to counsellors

COUNSELLORS-JAN/FEB

- informational meeting held for all students to explain process
- students complete application form and return to counsellors before Spring Break
- counsellors rank application form & return to COBSS

ALLOCATION-MAR/APR

- all students applying for specific bursary are read by community members/executive of COBSS
- bursary allocated to specific student
- specific student name & school listed on master sheet

OFFICE-APR/MAY/JUNE/AUG

- list of donor contacts presenting awards given to Counsellors
- list of awards and recipients for each school distributed to Counsellors
- letters to recipient and donors completed
- Certificate of Awards generated to accompany letter to student
- master book compiled for all awards & recipients
- Certificate of Award returned from institution to COBSS for payment
- cheque(s) written to institution(s)
 - check to make sure institution is an accredited learning institution if not familiar with the institution
- master book check off indicating institution attended, cheque number & date cheque written
- researching awards to reissuing lost Certificate of Awards
- returning phone calls/emails answering questions regarding awards & procedure to be followed
- preparing and advising donor if bursary unclaimed
- advising donors of balances on their account
- sending renewal contracts to donors for updating