Administrative Procedure

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Subject: SCHOLARSHIP ADMINISTRATION

1.0. PURPOSE:

To establish the procedures which govern the administration of the University Scholarship Program.

2.0. ORGANIZATIONS AFFECTED:

2.1. University Advancement Office.

2.2. The Cal State LA Foundation (Foundation).

2.3. Center for Student Financial Aid, Scholarship Office (Scholarship Office).

2.4. Communications and Public Affairs Office.

2.5. Departments awarding scholarships.

2.6. Business Financial Services (BFS).

3.0. REFERENCES:

3.1. Title V of the Education Amendments of 1965.

3.2. Financial Aid Policies and Procedures, published by the Office of the Chancellor.

3.3. Scholarship Criteria, published by the Scholarship Office.

3.4. California State University, Los Angeles (Cal State LA) Administrative Procedure 707, Records Retention, Management, and Disposition Program.

4.0. POLICY:

The University will effect procedures to achieve the timely and equitable awarding of all scholarships and the utilization of all available scholarship monies in order to enhance the University's recruitment and retention efforts. In order to be eligible for on-campus scholarships, a student must be enrolled. Other specific criteria may be established by donors.

Approved: _____ **Date:** _____

5.0. DEFINITIONS:

5.1. On-Campus Scholarships - Scholarships awarded by departments, organizations or committees of the University. These include scholarships awarded by academic departments, Associated Students, Inc., and representative scholarship committees.

5.2 Off-Campus Scholarships - Scholarships awarded by private donors. Applicants are selected by the donor. The donor notifies the University of recipients and forwards funds to Student Financial Services. The Center for Student Financial Aid is responsible for awarding accordingly to criteria.

5.3. University Scholarship Committee - Committee formed to award general scholarships for which there is no designated department or donor. The Committee consists of the Dean of Undergraduate Studies, the Dean of Graduate Studies, the Scholarship Coordinator, and appropriate college deans or designees.

6.0. RESPONSIBILITIES:

6.1. The University Advancement Office will:

6.1.1. Receive all in-coming scholarship donations and forward to the CSULA Foundation.

6.1.2. Prepare the Scholarship Authorization Application and Criteria form for new scholarships.

6.1.3. Promote the establishment of new scholarships and the enlargement of existing scholarships.

6.1.4. Provide information to donors regarding the selection process.

6.1.5. Provide donors with copies of any clippings and news releases related to scholarship awards.

6.1.6. Forward letters of appreciation to donors.

6.2. The Foundation will:

6.2.1. Deposit and account for all incoming scholarship donations.

6.2.2. Manage the accounts for all on-campus scholarships.

6.2.3. Provide account balances and other pertinent information as requested by the Scholarship Office and the University Advancement Office.

6.2.4. Prepare a quarterly account balance report and forward to the Scholarship Office and the University Advancement Office by 10 -15 working days after the close of the accounting period.

6.2.5. Prepare annual account balance reports to departments, and quarterly for those that make this request, 10 -15 days after the close of the accounting period.

6.2.6. Review and recommend investment policy as it relates to scholarships and endowments to the Foundation Investment Committee.

6.3. The Scholarship Office will:

6.3.1. Distribute, accept and process applications for scholarships.

6.3.2. Advise students of the policies, procedures, eligibility requirements, and deadlines of the various scholarship programs.

6.3.3. Screen applicants for minimum qualifications.

6.3.4. Assemble scholarship packets and forward to the dean or responsible committee in a timely manner.

6.3.5. Notify students of scholarship awards and/or the status of their applications.

6.3.6. Require recipients to forward a letter of appreciation to the Scholarship Office.

6.3.7. Notify the Office of Public Affairs and University Advancement and other offices as requested of scholarship award recipients.

6.3.8. Coordinate scholarship awards with recipients' other financial aid, if any.

6.3.9. Reconcile the monthly account balance report prepared by the Foundation Office.

6.3.10. Publicize available scholarships and eligibility requirements.

6.3.11. Work directly with faculty advisers, department chairs, and appropriate college deans to publicize scholarship opportunities and identify potential applicants.

6.3.12. Refer all donor inquiries to the University Advancement Office.

6.4. The Communications and Public Affairs Office will:

6.4.1. As appropriate, prepare press releases related to scholarship awards for local and/or the recipients' hometown newspapers, and review releases related to off-campus donors with the University Advancement prior to their issuance.

6.4.2. Provide the link to the release and any resulting coverage to the University Advancement and Scholarship Offices.

6.5. Selection Committees will:

6.5.1. Review applications and select scholarship recipients and alternates by the appropriate deadline.

6.5.2. Maintain scholarship account balances and verify with the Scholarship Office, as needed.

6.5.3. Maintain a rank order list of eligible scholarship recipients to be used in the event it becomes necessary to continue awarding from a scholarship fund or to delay an award due to lack of funds.

6.5.4. Notify the Scholarship Office of recipients and alternates.

6.5.5. Notify the Scholarship Office of changes in present scholarships.

7.0. PROCEDURES:

7.1. Scholarship Establishment

7.1.1. The University Advancement Office will:

a. Determine with donors the type of scholarship fund to be established (annual or endowed), the amount of the fund, and the criteria for selecting recipients and expending the fund.

b. Prepare the Scholarship Authorization Application and Criteria form and secure the signature of the donor.

Funds may be expended only as set forth by the donor on the criteria form. Any changes to the criteria requires an amended form.

c. Receive scholarship donations on behalf of the University.

d. Forward funds to the Foundation.

7.1.2. The Foundation will:

a. Request an Item Type number through the Scholarship Office and an account number through the Business Financial Services Office.

b. Distribute scholarship authorization application and criteria forms to the donor, Scholarship Office, and academic departments.

c. Notify the Scholarship Office and academic department of any criteria changes in existing scholarships.

d. Maintain established donor information with regards to current criteria, availability and amounts.

e. Ensure that all documents related to the accounts are properly completed.

f. Prepare and distribute quarterly reports 10 - 15 working days after the close of the accounting period to the Scholarship Office.

g. Notify the Scholarship Office by March 15 of Foundation projected distribution available July 1 for all endowed accounts.

h. Invest funds according to Foundation Policy.

7.1.3. The Investment Committee of the Foundation Board will:

a. Review investment policy as it relates to scholarships and endowments to ensure that the University is receiving the optimum return on its investments.

b. Propose investment policy to the Foundation Board.

7.2. Application Deadlines

7.2.1. New and continuing students will submit Scholarship Applications by the published dateline.

7.3. Preliminary Review

7.3.1. The Scholarship Office will screen applications for minimum criteria.

7.3.2. The Scholarship Office will forward the completed packets to the appropriate dean, organization, or selection committee.

7.4. Selection

7.4.1. The appropriate department, organization or committee will:

a. Review applications and select a recipient and first alternates.

b. Immediately notify the Scholarship Office of the recipient and alternates, including the recipient's scholarship transaction form.

c. Retain a list of all applicants labeled "recipient," "alternate," or "not qualified," in the order in which they were ranked based on the selection criteria.

7.4.2. After selection, the Scholarship Office will:

a. Notify each applicant of the results of the selection process and of the status of their application, if necessary.

b. Require recipients to forward a letter of appreciation to the donor, as a part of the award acceptance.

c. Process awards.

7.5. Annual Reports

The Scholarship Office and Foundation Accounting Office will provide quarterly and annual narrative and fiscal reports to the Vice President for Administration and Chief Financial Officer for inclusion in reports to senior management on a request basis.

7.6. Records Retention

In accordance with Cal State LA Administrative Procedures 707, Records Retention, Management, and Disposition Program, all scholarship award determination materials shall be retained for two (2) years from the award determination.

8.0. APPENDICES:

8.1. Scholarship Authorization Application and Criteria.

8.2. Scholarship Application.

8.3. Letter of Recommendation Form.

8.4. Scholarship Transaction Form.