



# Oregon

Kate Brown, Governor

Higher Education Coordinating Commission

Office of Student Access and Completion

13225 25th St SE

Salem, OR 97302

[www.oregon.gov/HigherEd](http://www.oregon.gov/HigherEd)

[www.OregonStudentAid.gov](http://www.OregonStudentAid.gov)

Re: Establishing a scholarship with Oregon Office of Student Access and Completion

The Office of Student Access and Completion (OSAC) appreciates your interest in establishing a new scholarship fund to assist deserving Oregon students pursue their college education and training. To better acquaint you with OSAC's scholarship administration program, I have enclosed several documents for your review:

1. ***OSAC Scholarship Brochure for Donors***

This publication for prospective donors provides an overview of OSAC's scholarship program and its services to donors.

2. ***Steps to Establish a New Scholarship Fund***

Learn about the steps to create a fund based on your unique set of criteria that helps define the type of deserving student for your award.

3. ***Fund Guidelines (Scholarship Eligibility Criteria Checklist & Guide)***

Completing the Scholarship Eligibility Checklist is your first step in establishing your scholarship fund and is a significant document, as it specifies criteria used to identify qualified applicants. A checklist guide is included that further explains each item.

4. ***Scholarship Background Materials***

a. The ***OSAC Scholarship Timeline*** graphically depicts the scholarship awards program cycle from application to disbursement of award funds.

b. ***Oregon Administrative Rules*** governing OSAC's scholarship programs provide rules and guidance in establishing all new programs.

c. ***Tax Exempt Status***-Form

OSAC will work with you to establish your new scholarship fund including information about the method you will use to select your awards. Once completed, OSAC will send you a closing packet of materials containing copies of your signed documents, OSAC Scholarship Handbook, and an invoice, if relevant, for a partial payment of your first scholarship award.

If you have further questions, please do not hesitate to contact OSAC.

541-687-7400 or 800-452-8807

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## OSAC SERVICES TO DONORS

- Customizes a scholarship to your specifications to reach your desired applicant pool.
- Publicizes and markets your scholarship across the state through high schools, public libraries, universities, community colleges, employment offices, college fairs, as well as traditional and social media.
- Directs students in ASPIRE\* -designated schools and sites to OSAC scholarship opportunities.
- Reviews and processes nearly 15,000 scholarship applications annually.
- Distills applicant pools to a manageable size for scholarship selection committees.
- Uses FAFSA (Free Application for Federal Student Aid) information to accurately report and assess financial need.
- Notifies scholarship award recipients and ensures understanding of award conditions with recipients.
- Disburses award(s) directly to recipients' college financial aid offices.
- Provides annual reports of funds and awards to donors.

\* ASPIRE is a mentoring program in more than 135 high schools and community sites that provides information about college options, admissions, and financial aid.

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## SCHOLARSHIPS AS CHARITABLE DONATIONS

The Office of Student Access and Completion (OSAC) may accept gifts of cash, securities, and/or personal property to establish a scholarship program, all of which are tax-deductible contributions. Bequests of cash or property, life insurance or retirement plan assets naming OSAC as beneficiary are also possible contributions.

*Donate to a scholarship or establish a scholarship today!*

OSAC partners with Oregon's largest private provider of scholarships, The Ford Family Foundation, and one of the nation's largest community foundations, The Oregon Community Foundation (OCF) to administer scholarships generated from endowed gifts. OCF is a nonprofit foundation that administers permanent charitable funds on behalf of individuals, families, businesses, and organizations that support humanitarian, educational, and cultural programs that benefit their communities and the state as a whole.

CONTACT:  
OFFICE OF STUDENT ACCESS  
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Office of Student Access and Completion

## ESTABLISH A SCHOLARSHIP

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OSAC's primary goal is the professional and financial stewardship of your scholarship fund.

Establish a scholarship for as little as \$1,000.





*Your gift is a lasting legacy for Oregon's future. Start a scholarship or contribute to an existing fund, today!*

The Office of Student Access and Completion (OSAC) is unique in the nation for its public/private partnership to establish and administer scholarships for the benefit of Oregon students. OSAC administers more than 450 privately funded scholarship programs, awarding more than 3,000 students each year. These scholarships help students attend public, private, nonprofit, and for-profit postsecondary schools in Oregon and throughout the United States.



Do you have a desire to help students achieve their goals or pursue their passions? Consider establishing a scholarship fund to assist deserving Oregon students.



# HELP A STUDENT REALIZE A DREAM

## Private Scholarship Awards Make a Difference

An investment in postsecondary education for Oregon students is a key economic and personal opportunity. With college tuition costs spiraling, financial aid dollars decreasing, and loan debt rising, establishing a scholarship is an excellent opportunity to make a significant impact.



### SCHOLARSHIP FUND OPTIONS

For all fund options, donors determine the scholarship eligibility criteria with assistance from OSAC.

#### PASS-THROUGH SCHOLARSHIPS

OSAC invoices the donor annually to cover the scholarship award(s) and the administrative charges. Donors confirm participation each year. Minimum scholarship award is \$1,000.

#### OSAC TRUST FUND

An irrevocable trust fund is established and named by the donor and held by the Oregon State Treasury. The scholarship award and administrative charge is drawn from the trust and its interest earnings for the life of the scholarship. Minimum scholarship award is \$1,000.

#### ENDOWMENTS: THE OREGON COMMUNITY FOUNDATION (OCF) SCHOLARSHIPS

Donors can establish an endowment to fund scholarship awards in perpetuity by working with OCF. Awards are generated from interest earnings each year. The donor works with OCF to create a fund agreement and scholarship criteria.

#### EMPLOYER AND MEMBERSHIP SCHOLARSHIPS

Any business, civic, or membership organization that wishes to support scholarships for their employees, dependents, or members of an organization may work with OSAC. Minimum scholarship award is \$1,000.



<p><b>Step 1.</b> Select Type of Scholarship Program</p>	<p><b>Step 2.</b> Establish Eligibility Criteria</p>	<p><b>Step 3.</b> Establish Selection Committee</p>	<p><b>Step 4.</b> Select Award Recipient(s)</p>	<p><b>Step 5.</b> Submit Payment or Contribution</p>
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## Steps for Establishing a Scholarship Fund

OSAC and donors work in partnership to establish a scholarship program custom designed to award a deserving student(s). The minimum award is \$1,000 that OSAC disburses to the recipient’s college financial aid office.

### Step 1. Select Type of Scholarship Program

Donors select the type of program administered by OSAC:



**A. PASS-THROUGH SCHOLARSHIPS**

OSAC sends an invoice to cover current-year awards and administrative charges. Donors confirm continued participation each year. Minimum award is \$1,000.

**B. OSAC Trust Fund**

An irrevocable trust fund in the donor's name is established with the State of Oregon Treasury. The scholarship award and administrative charge is drawn from the trust and its interest earnings for the life of the scholarship. Minimum award is \$1,000.

**C. Endowments: The Oregon Community Foundation Scholarships**

Donors establishing scholarship programs with endowments of \$50,000 or more work with Oregon Community Foundation (OCF), where foundation staff develops donor fund agreements and set scholarship criteria. OCF is ranked among the nation's top charitable community foundations. Awards come from interest earnings.

**D. Employer and Membership Scholarships**

Employers, credit unions, electrical co-ops—any business, civic, or membership organization that wishes to support scholarships for its employees, employee dependents, or members of an organization may work with OSAC. Employer-sponsored programs are subject to IRS regulations and verification of the applicant pool.

### Step 2. Establish Eligibility Criteria

Your scholarship fund can be named by the donor or your family. You will participate in determining your scholarship criteria using a [checklist](#) of options available. Criteria may include:

- Graduates of a particular high school, undergraduate or graduate students
- Type of college(s) where the award may be used (public, private, nonprofit, for-profit)
- In-state or anywhere in the United States
- Whether or not financial need is considered
- Cumulative GPA
- College Major
- Activities or Community Service

*A scholarship can be a tribute, a testament, or a torch to inspire, memorialize, commemorate, or reward.*

All OSAC scholarship awards must be accepted by at least two institutions recognized by the U.S. Department of Education as eligible to participate in federal Title IV student financial aid programs. You can determine if a student must attend [an Oregon eligible institution](#) or a college outside of Oregon. We can assist in researching eligible schools outside of Oregon.

### Step 3. Establish Selection Committee

Your Selection Committee members are selected by you and typically comprised of volunteers (educators, donors, individuals with expertise or knowledge in a certain field) who bring their life experience, perspective, and local knowledge to the selection process. Selection Committees must:

- Consist of at least three members
- Avoid conflict of interest issues
- Follow [federal regulations](#) concerning donor involvement

After using its extensive database to match applicants to the scholarship criteria, screening all data and transcripts, OSAC will provide the Selection Committee with ranked lists of qualified applicants for the scholarship.

To see the elements involved in reviewing applications, please refer to the [Scholarship Handbook](#).

### Step 4. Award Scholarships

Once the Selection Committee has selected and notified OSAC of the award recipient(s), OSAC will contact the selected student by email, ensure that the award is confirmed, and trigger notifications to the college financial aid offices to mandate that funds are used for educational purposes. OSAC will receive information from the student's school, monitor the student's progress and work directly with the financial aid offices regarding payment.

### Step 5. Submit Payment or Contribution for Your Newly Created Scholarship

Once your Scholarship Checklist and Program Agreement forms are signed and returned to OSAC, you will either receive an invoice for a partial payment of your scholarship award followed by an invoice for the balance owed, or OSAC will withdraw the award and scholar services charge from the trust fund account. In both cases, OSAC will disburse the award to the recipient's college financial aid office prior to the fall term.

No programs may discriminate among applicants on the basis of race, gender, religious preference, or ethnic origin.



*Your gift is a lasting legacy for Oregon's future. We are all stakeholders in that legacy. **Start a scholarship or consider contributing to an existing fund, today.***



## Oregon Office of Student Access and Completion

### Guide to Scholarship Eligibility Criteria Checklist

**PLEASE USE THIS GUIDE TO ASSIST IN COMPLETING THE BLANK CHECKLIST**

Scholarship Fund Name: **Provide a name for your scholarship**

Fund Code: **To be determined by OSAC**

Est. Number of Award(s): **Number of students you wish to award**

Award Amount(s): **Minimum amt.: \$1,000**

**Scholarship Purpose (Donor Intent):** Describe whom the scholarship is intended for by providing a brief description. Example: *to award a graduating high school senior from Lane County, who may not have an outstanding GPA, but has demonstrated steady progress in academic achievement, overcome adversity in his/her life, and has a strong desire to obtain a college education to meet his/her personal goals. Financial need is not a requirement, but will be considered*

1. SELECTION CRITERIA: a. Eligible Students who can apply	State Yes or No	Note requirement or preference for a particular school or region (limiting different areas can reduce applicant pool and is at discretion of donor)
US citizen or eligible noncitizen		Eligible noncitizen refers to an individual who is residing in the US with the intention of becoming a citizen. This does not pertain to international students residing in Oregon (often on a student visa. A "yes" includes both U.S. citizens and eligible noncitizens. Indicate if restricted to U.S. citizen or open to other.
Oregon resident		Limited to only Oregon residents as applicants.
Resident: specific state, county, city		Indicate other states, counties, or cities that the applicant needs to reside in. Leave blank if not a consideration.
Current graduating high school senior		Include name of eligible high school(s) or leave blank if all high schools should be included. Indicate school districts or high schools in a specific geographic area (e.g., Portland high schools, Lane County high schools,).
Prior high school graduate		"Prior" refers to someone who may have not attended college immediately after graduating from high school or may have completed some college and is resuming college studies.
College undergrad (if restricted to sophomore or above, please state in the notes section to the right)		Scholarship to be awarded to a student enrolled in an undergraduate program.
College graduate student		Scholarship to be awarded to a student enrolling in a graduate program.
Prior award recipient		Indicate if a prior year award recipient is eligible to reapply & compete for this scholarship
GED recipient (identified by city/county of residence)		OSAC cannot find GED/home school applicants by school district.
Home-schooled graduate (identified by city/county residence)		Home-schooled student may not currently reside in area where degree obtained. Indicate city or county, if desired.

<b>b. College enrollment/Major</b>	<b>State Yes or No</b>	<b>Note requirement or preference for a particular college major, course of study, or career field</b>
Plan to enroll full-time		Usually, at least 12 credit hours for full-time status in undergraduate program, 9 credit hours in graduate program.
Plan to enroll at least half-time ( <i>includes full-time enrollment</i> )		If “yes”, this implies full time enrollment, as well. Most colleges assume a minimum of 6 undergraduate credits as part-time enrollment. Indicate if less is acceptable to donor. Grad student programs vary and should be checked.
College Major ( <i>list major and whether it is required or preferred in the notes section to the right</i> )		Selecting a college major can help reduce the applicant pool size.
Career Field:		

<b>c. Eligible institutions (where award may be used) All programs must be eligible to participate in federal Title IV student financial aid programs.</b>	<b>State Yes or No</b>	<b>Note preference or requirement for a school or region (minimum 2 colleges required)</b>
Public Community Colleges ( <i>2-year</i> )		
Public Colleges/Universities ( <i>4-year</i> )		
Private institution		e.g. Willamette, Pacific, Reed, Lewis & Clark. <b>Must indicate whether nonprofit, for-profit or both below.</b>
-Nonprofit institution ( <i>also includes Public</i> )		Can be public, private school, and religious-based schools
-For-profit accredited ( <i>includes vocational/trade schools</i> )		Proprietary school such as a vocational career training programs that are “for profit” e.g. culinary school, aviation, beauty schools
Located in Oregon ( <i>only Oregon</i> )		If Oregon only, specify colleges here, if this is desired.
Located in the United States ( <i>includes Oregon</i> )		Can also be limited to specific states, if indicated here.

<b>2. SCHOLARSHIP AWARDS</b>	<b>Check One ✓</b>	<b>Years of eligibility to receive award (including initial award year)</b>
Applicant may receive award “one-time” only		A new recipient is selected each year; cannot reapply.
Awardee may reapply & compete		Indicate how many years to reapply, <u>including</u> that first year. For instance, the recipient would be awarded and have three additional years of schooling for a total of four years. Please indicate if you would like prior awardees to receive a preference when they reapply.
Auto renewable award		Indicate how many years to renew award. Renew criterion generally is satisfactory progress (SAP) toward a degree as determined by their college.

		Lack of SAP returns funds to OSAC. Can indicate if financial need a consideration after first year and whether FAFSA needs to be resubmitted. Maximum number of years _____
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3. ADDITIONAL SELECTION CRITERIA		Applicant Pool priority for Ranking Report <b>Selection committees sometimes need guidance when making final decisions on scholarship awardee. Information below allows donors to prioritize areas of highest concern. This helps selection committee make final decision.</b>
If needed to reduce applicant pool, would Financial Need or Academics be your priority? (check one)	Financial Need _____ Academics _____	
<b>a. Financial Need</b>	Check One ✓	Notes
FAFSA required by applicant. Applicant must demonstrate financial need.		OSAC is the state record holder of FAFSA (Free Application for Federal Student Aid) data for Oregon residents. The FAFSA determines eligibility for financial aid by generating the <i>Expected Family Contribution (EFC)</i> —the dollars a family is expected to provide for education costs. The Remaining Financial Need is then calculated by OSAC using the estimated cost of college minus the EFC, minus estimated government financial aid. The Remaining Financial Need will be greater based on the higher price of college tuition. Checking yes in this section will require a FAFSA. Selection committee will <b>only</b> see list of applicants demonstrating financial need.
FAFSA required, but demonstration of financial need not required. Need may or may not be considered.		Some students who submit a FAFSA, still may not show financial need. These students will still be part of the applicant pool under this scenario.
FAFSA recommended. Show applicants with both need and no need.		A FAFSA would not be required but could be instructive to the selection committee to show financial data.
FAFSA not required by applicant.		Self-explanatory.
<b>b. Academics:</b>	State score/ GPA	✓ Check if criterion is a preference or requirement
College Entrance Tests (add other tests if nec.) SAT ave. =1500; ACT ave.=21		<b>Indicate Preference or Required. Preference doesn't exclude applicants; but cuts the pool if it is too large</b> ___ Preference ___ Requirement
Min. unweighted cumulative high school GPA Score		___ Preference ___ Requirement
Min. unweighted cumulative college GPA Score		___ Preference ___ Requirement
GED certificate		___ Preference ___ Requirement

4. STUDENT QUALITIES (Personal Statements, Activities Chart or additional criteria for Selection Committee consideration, ONLY)		
Rank priority, with 1 being the highest priority	Rank	Notes
<b>a. Goals/task commitment</b>		Answers to these questions help create a profile of the applicant's personality and character; difficult to achieve by looking at GPA and test scores.



b. Community service/ Leadership/group contributions		
c. Knowledge/creativity or artistic ability/ <b>strengths /skills</b>		
d. Personal growth experience		
e. <b>Other</b> (e.g., specific essay, student activities chart, work history)		<i>This is a place where you can provide the selection committee your “passion” regarding a scholarship awardee. Do you have a particular type of candidate you are looking for?</i>

**5. PERSONAL STATEMENT QUESTIONS** (Student qualities above [4. a-e] are based on answers to the personal statement questions below.)

- a. Explain your career aspirations and your educational plan to meet these **goals**.
- b. Explain how you have helped your family or made your **community a better place to live**. Provide specific examples.
- c. Describe a personal accomplishment and the **strengths** and **skills** you used to achieve it.
- d. Describe a **challenge or obstacle** you faced in the last ten years. Provide specific examples.

**Extra Documents:** OSAC encourages using only the listed personal statement questions to further inform Selection Committee. After approval by an OSAC scholarship consultant, please note any required extra documents below.

**OSAC personal statement questions have been developed with strong research and data. Donor should require an extra essay question ONLY in special circumstances. Please consult with scholarship consultant, if needed.**

<b>6. DONOR INFORMATION (Content for scholarship information on website)</b>	<b>Check if yes</b> ✓	<b>Notes</b>
Company /Organizational Logo (tiff or png preferred, 200 – 800 pixels)		Please submit logo at time of checklist
Photograph		Photo of donor, memorial scholarship, etc
Additional Website Link		
Plans for awarding event or ceremony		
Joined Donor Facebook Page		This page will keep our donors abreast of OSAC events, scholarship winners, etc

**7. DONOR BACKGROUND STORY**

Your generosity helping Oregon students is an important act. Your “donor story” may motivate others to do the same, which may help even more Oregon students. Why did you establish a scholarship? What do you feel is particularly important about scholarships? Please include any information that you consider relevant to the creation of this scholarship. The space below will yield to the length of information you wish to share.

*(continue on next page)*

(continued)

8. SELECTION PROCESS	Yes or No	Notes
Selection by Donor group		Donor family members must not comprise majority of committee per HR 4.
Selection by OSAC ( <i>employer awards only</i> )		
<b>a. Applicant Pool</b>		
Number of applicants Selection Committee wishes to review		OSAC may help forecast size based on previous year's applicant pool size
Number of Alternate Designee(s)		Occasionally award recipient must decline award. Alternates allow for smooth processing. Recommend at least 2-3 alternates.
Electronic Review of Applications ( <i>Yes or No</i> )		Final applications may be reviewed electronically by each Selection committee member by accessing the OSAC web portal. Ideal for members who cannot attend meetings or if they are located in remote areas.
<b>b. Additional Notes/Commentary: (Use attachment, if necessary)</b>		
<b>This section contains the Scholarship Program Description that will appear in the online scholarship catalog:</b>		
<ul style="list-style-type: none"><li>▪</li></ul>	Scholarship Code.....	
	<ul style="list-style-type: none"><li>•</li></ul>	

**This section contains the Scholarship Program Description that will appear in the online scholarship catalog:**  
 (The box below is a template for Joyce to use once Cheryl gives her the descriptor after reviewing the checklist. Delete contents before officially using this form with a donor.)

Who is eligible to apply. Include part-time enrollment, if applicable. Colleges in this section  (Examples are below)  Any HS Specific HS First-time freshman Undergrad Undergrad (prior recipients only) Graduate Part-time Oregon Colleges USA Colleges Specific Colleges	<b>(Name of scholarship) (Fund Code)</b> (Example of criteria to include)  US Citizens Residency: Graduating seniors (students) of Graduating high school students of Preferences: (the database contains 45+ preferences) GPA: SAT/ACT: Activities: Major: Career Field: Colleges: Enrollment: FAFSA: Apply-compete annually Additional Requirements:
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**Contact Information**

<b>Donor Contact</b> Name: Address: City, State, Zip: Phone: Email:	<b>OSAC Portfolio Coordinator</b> Name: 13225 25th St SE Eugene, OR 97302 541-687-7400 Ext: Email:
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Approved by: \_\_\_\_\_ Date: \_\_\_\_\_  
*Donor Representative*

\_\_\_\_\_ Date: \_\_\_\_\_  
*Print Donor Name*

Approved by: \_\_\_\_\_ Date: \_\_\_\_\_  
*OSAC Representative*

\_\_\_\_\_ Date: \_\_\_\_\_  
*Print Name*

OSAC Use Only	RA	PC	DS
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## Oregon Office of Student Access and Completion Scholarship Program Agreement

Scholarship Fund Name:

Fund:

Date Established:

Academic Year Award Begins:

Scholarship Type:

Number of Awards:

Award(s):

### **Statement of Agreement**

Both parties agree to administer this scholarship according to the attached rules for the program and Oregon Administrative Rules, Chapter 575, Division 60. Both Parties understand that the gift of the fund(s) to establish this scholarship and any subsequent contributions thereto, are **irrevocable bequests** to the State of Oregon that will not be returned to the donor(s) under any circumstances.

### **Application for Award**

Students apply by submitting the Office of Student Access and Completion (OSAC) Scholarship Application (eApp online or paper application), including all required documents by the OSAC designated deadline at [www.oregonstudentaid.gov](http://www.oregonstudentaid.gov)

### **Selection**

The signed **Scholarship Program Agreement** and **Scholarship Eligibility Criteria Checklist** base selection of award recipients on the applicants who applied as defined. Future revisions to the selection criteria for the next scholarship awarding period must be completed prior to printing of the OSAC Scholarship Application in late summer. All documents and information provided by OSAC to selection committees shall be used solely for determining recipients for this specific scholarship award, only. All application materials are confidential and can be used only during the selection process, for no other purpose, and must be destroyed or returned to OSAC.

### **Awarding**

The donor in consultation with OSAC shall fix award amounts each year. Donors may supplement the fund to increase awards with an additional contribution. OSAC shall notify the recipients and specify the requirements of the award. Recipients shall sign and return the award notice, acknowledging the terms and certifying that the funds will be used only for educational expenses. OSAC shall be responsible for the disbursement of scholarship funds to the recipient's college financial aid office. OSAC shall maintain a complete and accurate record of the scholarships awarded. Scholarships may only be disbursed to institutions certified to receive federal Title IV financial aid funds in the United States. The scholarship funds will be made available to the recipients by their school. To receive disbursements throughout the year, awardees shall make satisfactory academic progress according to institutional policies for students receiving federal Title IV aid.

### **OSAC Management of Funds or Invoicing of Funds**

OSAC shall establish an account for this scholarship fund that operates in accordance with Oregon Revised Statutes Chapter 348 and Oregon Administrative Rules, Chapter 575, Division 60. All funds are irrevocable and deposited with the State Treasurer, who will hold, invest the funds, or transfer them to a scholarship investment account at The Oregon Community Foundation (OCF) if it meets the foundation's endowment criteria. All invested funds are subject to market conditions. There is no guaranteed interest earnings rate. For "Pass-through" programs, OSAC will invoice the donor for a percentage of the award immediately after the fund has been established, followed by an invoice for the balance due prior to the award disbursement. Fund earnings or refunds resulting from a student's failure to complete a full study period shall be returned to the account and be used for future awards and administrative charges. (A Scholar Support Services administrative charge is assessed for each award).

\_\_\_\_\_  
Signature of Donor or Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Donor or Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of OSAC Representative

\_\_\_\_\_  
Date

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# OSAC Scholarship Timeline



Sept

Oct

Nov

Dec

Jan

Feb

March

April

May

June

July

Aug

Donor Establishes Scholarship & Eligibility Criteria (Year Round).

OSAC Conducts Outreach & Publicity

OSAC Generates Qualified Applicant Pool

Students Submit Application

Donor or OSAC Selection Committees select award recipients

OSAC Reviews & Processes Applications

Accountability: Confirm recipients & Disburse Awards to Colleges

\* ASPIRE is an OSAC mentoring program to help students plan for education & training beyond high school.

**DEPOSIT TO ESTABLISH A NEW PASS-THROUGH SCHOLARSHIP PROGRAM**

Date of Estimate: DATE

Name of Scholarship: FUND NAME

Fund Code: ###

Amount Due

Number of Annual Awards

X

Amount of Annual Awards

X  Equals

Administrative Charge-Year 1

(30% of Annual Award Amount)

X  Equals

Administrative Charges - Years 2 & 3

(15% of Annual Award Amount)

X  Equals

Total Deposit

Please make check payable to "Higher Education Coordinating Commission"  
(Reference "FUND NAME #XXX " on the check)

Remittance Address: Higher Education Coordinating Commission  
Office of Student Access and Completion  
3225 25th Street SE  
Salem, OR 97302



# Oregon

Kate Brown, Governor

**Office of Student Access and Completion**

3225 25th St SE, Salem, OR 97302  
(800) 452-8807 and (541) 687-7400; Fax: (541) 687-7414  
[www.OregonStudentAid.gov](http://www.OregonStudentAid.gov)

## Office of Student Access and Completion Tax Exempt Status

The Oregon Office of Student Access and Completion (OSAC) is an Office of the Higher Education Coordinating Commission (HECC), which is a state agency established by the Oregon legislation dedicated to fostering and sustaining the best, most rewarding pathways to opportunity and success for all Oregonians through an accessible, affordable and coordinated network for educational achievement beyond high school.

The Oregon Administrative Rules (OAR) for OSAC's Privately Funded Awards Programs can be found in Chapter 575 and Division 60 Privately Funded Award Programs. We administer nearly 500 programs.

Governmental units, such as States and their political subdivisions, are not generally subject to federal income tax. Charitable contributions to governmental units are tax-deductible under section 170 C (1) of the Internal Revenue Code if made for public purposes. OSAC fulfills this IRS requirement.

As an office of the HECC, OSAC is allowed by the State of Oregon to receive gifts of for the purpose of establishing, continuing and increasing financial aid. Charitable donations for our private scholarships are tax deductible. Our Federal I.D. number is 37-1737848.

# HIGHER EDUCATION COORDINATING COMMISSION OFFICE OF STUDENT ACCESS AND COMPLETION

## DIVISION 60

### PRIVATELY FUNDED AWARD PROGRAMS

**575-060-0005**

#### Definitions

For the purposes of Privately Funded Award Programs which the Commission administers, the following definitions shall be used unless specified otherwise by a donor:

- (1) "Academic Year." A period of time, normally beginning in August or September, in which a student would normally be expected to complete at least three-quarters of full-time instruction or the equivalent.
- (2) "Commission." The Oregon State Scholarship Commission.
- (3) "Cost of Education." The sum of tuition and fees, room and board, books and supplies, transportation personal expenses, and other allowable costs identified by the U.S. Department of Education.
- (4) "Dependent/Independent Student." The definitions of dependent/independent student shall be the definition used for the student aid programs under Title IV of the Higher Education Act of 1965 as amended.
- (5) "Generally Accredited Institution." An institution accredited by the Northwest Association of Secondary and Higher Schools.
- (6) "Resident of Oregon." Residency is established by virtue of the student (in the case of independent students) or the student's parents (in the case of dependent students) having been in continuous residency in this state for the 12 months preceding enrollment. Residency is immediate in the case of a dependent whose parents have moved to this state for a reason other than the student's enrollment. The residency period may be reduced to the preceding six months in the case of an independent student who moved to this state for a purpose other than education:
  - (a) A dependent resident student whose Oregon domiciled parent(s) move out-of-state shall retain resident classification as long as such student is continuously enrolled at an Oregon high school or postsecondary institution. Continuous enrollment is defined as completion of an academic year within any 12-month period;
  - (b) An independent resident student shall retain resident classification as long as the student is continuously enrolled at an Oregon postsecondary institution. Continuous enrollment is defined as completion of an academic year within any 12-month period;
  - (c) A dependent student whose parent(s) are serving on active duty in the United States Armed Forces outside the State of Oregon shall have residency status determined by the parents' declared "home of record." An independent student who is serving on active duty in the United States Armed Forces outside the State of Oregon shall have residency status determined by the student's declared "home of record";
  - (d) A student from a state other than Oregon, or from the Trust Territories, who is receiving or is eligible to receive financial assistance through the government of that state or the Trust Territories, shall not be considered a resident of Oregon.
  - (e) Residence Classification of Members of Oregon Tribes:
    - (A) Students who are enrolled members of federally recognized tribes of Oregon or who are enrolled members of a federally recognized Native American tribe which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon shall be deemed eligible for programs administered by the Oregon Student Assistance Commission that are limited to Oregon residents, regardless of their state of residence.
    - (B) For purposes of this rule, the federally recognized tribes of Oregon are those recommended by the Oregon University System in OAR 580-010-0037 for purposes of assessing resident tuition:
      - (i) Burns Paiute Tribe;
      - (ii) Confederated Tribes of Coos, Lower Umpqua and Siuslaw;



(iii) Confederated Tribes of Grand Ronde Community of Oregon;

(iv) Confederated Tribes of Siletz Indians of Oregon;

(v) Confederated Tribes of the Umatilla Indian Reservation;

(vi) Confederated Tribes of the Warm Springs Indian Reservation;

(vii) Coquille Indian Tribe;

(viii) Cow Creek Band of Umpqua Indians;

(ix) Klamath Tribes.

(C) For purposes of this rule, the federally recognized Native American tribes which had traditional and customary tribal boundaries that included parts of the state of Oregon or which had ceded or reserved lands within the state of Oregon are:

(j) CALIFORNIA:

(I) Benton Paiute Tribe;

(II) Big Bend Rancheria;

(III) Big Lagoon Rancheria;

(IV) Blue Lake Rancheria;

(V) Bridgeport Indian Colony;

(VI) Cedarville Rancheria;

(VII) Fort Bidwell Indian Tribe;

(VII) Hoopa Valley Tribe;

(IX) Karuk Tribe of California;

(X) Likely Rancheria;

(XI) Lookout Rancheria;

(XII) Lytton Rancheria;

(XIII) Melochundum Band of Tolowa Indians;

(XIV) Montgomery Creek Rancheria;

(XV) Pit River Tribe;

(XVI) Quartz Valley Indian Community;

(XVII) Redding Rancheria;

(XVIII) Roaring Creek Rancheria;

(XIX) Smith River Rancheria;

(XX) Susanville Rancheria;

(XXI) Tolowa-Tututni Tribe;

(XXII) Winnemucca Colony;

(XXIII) XL Ranch;

(XXIV) Yurok Tribe.

(ii) IDAHO:

(I) Nez Perce Tribe of Idaho;

(II) Shoshoni-Bannock Tribes.

(iii) NEVADA:

(I) Duck Valley Shoshone-Paiute Tribes;

(II) Fallon Paiute-Shoshone Tribe;

(III) Fort McDermitt Paiute-Shoshone Tribe;

(IV) Lovelock Paiute Tribe;

(V) Pyramid Lake Paiute Tribe;

(VI) Reno-Sparks Indian Colony;

(VII) Summit Lake Paiute Tribe;

(VIII) Walker River Paiute Tribe;

(IX) Winnemucca Indian Colony;

(X) Yerington Paiute Tribe.

(iv) OKLAHOMA: Modoc Tribe of Oklahoma.

(v) WASHINGTON:

(I) Chehalis Community Council;

(II) Colville Confederated Tribes;

(III) Quinault Indian Nation;

(IV) Shoalwater Bay Tribe;

(V) Yakama Indian Nation.

(D) A student seeking to be deemed eligible under the provisions of this rule shall submit, following procedures prescribed by the Oregon Student Assistance Commission, a photocopy of a tribal enrollment card or other acceptable documentation from a tribe which documents tribal membership.

(7) "Community Foundation" means an organization that is:

(a) A community trust or foundation within the meaning of Section 170 of the **Internal Revenue Code of 1986** and Section 1.170 A-9(e)(10) of the treasury regulations thereunder;

(b) Exempt from federal income tax under Section 501(c)(3) of the **Internal Revenue Code of 1986**; and

(c) Not a private foundation within the meaning of Section 509 of the Internal Revenue Code of 1986.

Stat. Auth.: ORS 183.325 & 348, OL 1993

Stats. Implemented: ORS 348

Hist.: SSC 4-1985, f. & ef. 4-17-85; SSC 4-1994, f. & cert. ef. 1-25-94; SSC 1-1998, f. & cert. ef. 3-18-98; OSAC 1-2006, f. & cert. ef. 2-8-06

## **575-060-0007**

### **Policy**

The Commission will administer privately funded awards pursuant to the following rules, by authority of ORS 348.530 and pursuant to the donor's intent.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

## **575-060-0010**

### **Eligibility**

Unless otherwise specified by a donor, an applicant for an award must:

- (1) Be a resident of the State of Oregon; and
- (2) Be a U.S. citizen or be in the United States for other than a temporary purpose and intend to become a permanent resident of the United States.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 4-1985, f. & ef. 4-17-85; SSC 1-1991, f. & cert. ef. 12-23-91

## **575-060-0012**

### **Eligible Institutions**

A donor must specify which institutions are eligible to receive award recipients. However, only institutions located in a state and recognized by the U.S. Department of Education as eligible to participate in federal Title IV student financial aid programs may be so designated and at least two institutions must be designated.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 1-1991, f. & cert. ef. 12-23-91; SSC 1-1998, f. & cert. ef. 3-18-98

## **575-060-0015**

### **Administrative Responsibility**

- (1) For an award program established by the proceeds by an estate, the Commission will establish award criteria in accordance with the conditions specified in the donor's last will and testament.
- (2) For a program established by employers for their employees and/or dependents of their employees, the donor and the Commission shall be governed by applicable federal Internal Revenue Service regulations.
- (3) The Commission shall faithfully execute the terms of any private award program in accordance with ORS 128.055 to 128.100.
- (4) The Commission will not deviate from the requirements of award criteria unless the change is made in accordance with section (5) of this rule.
- (5) Unless otherwise provided by the donor, the Commission reserves the right, after approval of the Attorney General, pursuant to his or her charitable supervision responsibilities, to amend an award's eligibility requirements if the Commission and the Attorney General believe that the donor's specific request is being frustrated for any reason. In making an amendment, the Commission will continue to endeavor to carry out the donor's overall general intentions.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 4-1985, f. & ef. 4-17-85; SSC 1-1991, f. & cert. ef. 12-23-91

## **575-060-0020**

## **Accountability and Record Keeping**

(1) For a program where the Commission is the disbursing agent, the Commission shall establish a separate account within the State Scholarship Commission Fund (ORS 348.570). All monies in the account shall be placed with the State Treasurer, who will hold and invest these monies as provided in ORS 348.580. Any interest that may accrue to such an account while on deposit with the State Treasurer will be used only for awards and administrative expenses of the account.

(2) Subject to the terms of the governing instruments and applicable law, the Commission may enter into agreements with one or more community foundations in Oregon to assume the management of the privately funded student aid programs of the Commission. The Commission may transfer to the community foundation any or all gifts or scholarship grants received by the Commission from any private donor.

(3) For any scholarship fund whose assets are transferred to the Commission, the prior trustee shall be responsible for any forms, notices, or taxes which should have been filed or paid for the taxable years during which the prior trustee administered the fund.

(4) The Commission shall maintain sufficient records to document its activities relating to each private award program. The Commission shall provide an annual report to each donor or donor's designate. This report shall include a statement of earnings, disbursements made, and fund balances.

Stat. Auth.: ORS 183.325 & ORS 348, OL 1993

Stats. Implemented: ORS 348.520 - ORS 348.530

Hist.: SSC 4-1985, f. & ef. 4-17-85; SSC 1-1991, f. & cert. ef. 12-23-91; SSC 4-1994, f. & cert. ef. 1-25-94

### **575-060-0025**

## **Approved Application**

For awards where the Commission processed applications or selects awardees, applicants will be required to use a private award application specified by the Commission.

Stat. Auth.: ORS 348.520 - ORS 348.530

Stats. Implemented: ORS 348.520 - ORS 348.530

Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

### **575-060-0030**

## **Conditions of Award**

(1) A student failing to make satisfactory academic progress as defined by the institution for students receiving federal Title IV aid may be denied payment of an award.

(2) No award shall be made to a student in default on any federal Title IV loan or owing a refund on federal Title IV funds previously disbursed.

(3) Awards shall be used only during a regular academic term but upon petition to the Commission and Commission approval, may be used during a summer term.

(4) Former awardees who voluntarily withdraw or fail to maintain satisfactory academic progress according to institutional standards may be considered for reinstatement by providing the Commission with a completed private award application, a transcript of all college work to date and, if required, completing a federally approved need analysis form.

Stat. Auth.: ORS 348.520 - ORS 348.530

Stats. Implemented: ORS 348.520 - ORS 348.530

Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

### **575-060-0035**

## **Selection**

(1) In administering a private award program, the Commission shall not discriminate against an applicant on the basis of age, sex, sexual orientation, marital status, race, ethnic origin, creed, religion, color, national origin, or the presence of any mental, sensory or physical disability. This rule shall not prevent donors from creating awards for disadvantaged persons or other persons to the extent not prohibited by law, nor shall this rule prevent the Commission from accepting administration of such a program if the Commission, in its discretion, believes the program award criteria are lawful.

(2) For a program where need is used in the selection of an awardee, an applicant shall complete a federally-approved need analysis form. The calculation of need will be determined by the Commission.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

#### **575-060-0040**

##### **Disbursement**

(1) Unless otherwise specified by the donor, the Commission shall disburse funds to an institution on behalf of an awardee on an academic term basis.

(2) An institution shall not disburse funds to an awardee who ceases to meet conditions of award identified by the Commission.

(3) An institution shall return undisbursed funds to the Commission within 30 days of receipt.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

#### **575-060-0045**

##### **Administrative Fees**

The Commission may charge an annual fee for servicing an award program. The Commission shall set the amount of the fee, based on a percentage of the amount of scholarships awarded annually.

Stat. Auth.: ORS 348.520 - ORS 348.530  
Stats. Implemented: ORS 348.520 - ORS 348.530  
Hist.: SSC 1-1991, f. & cert. ef. 12-23-91

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