

Office of Student Access and Completion

# Scholarship Handbook

## OSAC Mission

To create a college-going culture for all Oregonians by providing access through information, mentoring, and financial support.

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



*For Scholarship Donors & Selection Committees*

**Opportunity**  
NEXT EXIT



# Welcome

The Office of Student Access and Completion (OSAC) welcomes your interest and participation in helping Oregon students access postsecondary education or training.

Private scholarships established by individuals, employers, membership organizations, and foundations, play a major role in providing financial assistance to help make postsecondary education and training a reality for thousands of Oregon students and families.

This Scholarship Handbook is intended to acquaint both donors and scholarship selection committees with OSAC's scholarship administration program, the scholarship administration timeline, and the process for selecting and awarding recipients.

OSAC invites your questions and values your participation.

## **OSAC Mission Statement**

To create a college-going culture for all Oregonians by providing access through information, mentoring, and financial support.

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*Serving Oregon students since 1959*

## About the Office of Student Access and Completion

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Established by the Oregon Legislature in 1959, the Office of Student Access and Completion (OSAC) is responsible for administering a variety of state, federal, and privately funded student financial aid programs, including grants and scholarships, for the benefit of Oregonians attending institutions of postsecondary education. Each year, the agency helps over 50,000 Oregon students work toward their educational goals.

As a state agency, the Office of Student Access and Completion (OSAC) is unique in the nation for its private/public partnership in administering private donor scholarships to benefit Oregon students and families. OSAC administers more than 450 privately funded scholarships in partnership with The Oregon Community Foundation, The Ford Family Foundation, private individuals, employers, and membership organizations to help make college more affordable for Oregon students.

OSAC administers the state's largest need-based grant, the Oregon Opportunity Grant to help financially needy students attend an Oregon postsecondary institution. OSAC also manages ASPIRE (Access to Student Assistance Programs In Reach of Everyone), the state's mentoring program to help students plan for education and training beyond high school. For more information about all OSAC programs, visit [www.OregonStudentAid.gov](http://www.OregonStudentAid.gov).

## Importance of Private Scholarships

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Private scholarships are important for enhancing access to higher education for many students and families, especially low- and middle-income students. Scholarship support can play a critical role in bridging the gap for students and families who may be faced with applying for college loans to pay for higher education. The average student debt upon graduation is approximately \$26,000, making the availability of private scholarship aid more important than ever before.

Scholarships award personal and academic achievement by helping students of varying income levels, academic backgrounds, and personal interests, and allow students to make choices about two- and four-year colleges and types of degree or certification programs to pursue.

Some of these scholarships offer opportunities for students from diverse backgrounds such as former foster youth, single parents, and dislocated workers. Other scholarships are associated with specific high schools, academic and career interests, and residency.

Private scholarships allow donors to be flexible and creative in establishing eligibility criteria, such as community service or overcoming personal challenges— personal characteristics that cannot be measured through typical scholarship selection criteria such as grades and test scores.

The Office of Student Access and Completion may accept outright gifts of cash, securities, and/or personal property to establish a scholarship program, all of which are tax-deductible contributions.

# Section 1:

## Establishing a Scholarship Program



A scholarship program can be established in partnership with OSAC by individuals, employers, membership organizations, civic clubs, foundations, banks, and any other groups for the benefit of Oregon students. Scholarship programs are designed according to the donor's wishes, such as helping:

- Financially needy students attend college (4-year, 2-year, and vocational schools)
- Students pursuing a specific major or career interest
- Students transferring from a two-year to a four-year college
- Students from diverse backgrounds, foster youth, single parents, veterans, first-generation to attend college
- To memorialize a loved one or honor a family member or friend
- Employees and or their dependents
- Members of community organizations and their dependents

### Scholarship Fund Guidelines & Eligibility Criteria Checklist

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Donors work with OSAC to establish the name of the scholarship and determine eligibility criteria using the OSAC *Scholarship Fund Guidelines/Eligibility Checklist*. (Appendix page 24). The *Scholarship Fund Guidelines* form the basis for describing the donor's intent for the scholarship program and who is eligible to apply, where the award may be used (public, private, for-profit institution, etc.), whether financial need and or cumulative GPA is required, and if the award is one-time or can be renewed.

Scholarship criteria may include:

- graduates of a specific high school
- college undergraduate students
- whether financial need is considered
- college major or field of study
- other populations with specific circumstances
- type of institution where the award may be used (2- or 4- year public, private, nonprofit, for-profit postsecondary school)
- restricted to residents of certain communities within Oregon
- employees or their dependents of specific companies or members of associations
- college undergraduates
- nontraditional (older, returning) students
- cumulative GPA
- community service or activities

To complete the set-up of a new scholarship, donors sign a *Scholarship Eligibility Criteria Checklist and Program Agreement*, which makes up the Scholarship's Fund Guidelines.

Donors may serve as a member of the scholarship selection committee. However, donors may only constitute the minority representation on the committee. Donors may also decide not to participate in the selection process, and instead, use OSAC's internal volunteer selection committee.

# Oregon Administrative Rules (OAR): Scholarship Programs and Who Can Apply

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OSAC

As a state agency, OSAC 's scholarship programs are governed by the Oregon Administrative Rules 575-060-0005. These rules state that:

1. OSAC-administered programs will not discriminate among applicants on the basis of age, gender, sexual orientation, marital status, race, ethnic origin, creed, religion, color, national origin, or the presence of any mental, sensory or physical disability. This rule, however, does not prevent OSAC from accepting administration of such a program if OSAC believes the program award criteria are lawful.
2. Unless otherwise stated by a donor, the applicant: 1) must be a resident of the State of Oregon, 2) a citizen of the United States or an eligible noncitizen of the United States for other than a temporary purpose and intend to become a permanent resident of the United States, 3) must list Oregon as the home of record, if applicant is considered U.S. military personnel, and 4) If a high school student, s/he will graduate during the current academic year of filing an application.
3. 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 as eligible (that is, if a donor specifies a single educational institution as the only possible institution for recipients to attend, OSAC will refer the donor to the specific institution.)
4. Unless otherwise specified by the donor, OSAC shall disburse funds to an institution on behalf of an awardee on an academic term basis. An educational institution shall not disburse funds to an awardee who ceases to meet conditions of the award.

## Scholarship Cycle

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**September:** Promotional material announcing scholarships and application deadline distributed statewide to all high schools, colleges, community colleges, public libraries, and other key locations.

**January/February/March:** Application review begins in mid-January. Applications submitted online by February 15 qualify for an Early Bird review for errors, which may be corrected and resubmitted to OSAC by the final deadline of March 1. Error free applications submitted by February 15 qualify for a drawing to win a \$500 Early Bird scholarship. OSAC selection committee chairs are sent notification to begin formation of selection committees.

**April/May/June:** Eligibility lists of qualified applicants for each scholarship are created. OSAC and OCF selection committees review applications to select award recipients and return all required forms. OSAC notifies award recipients.

**July:** OSAC sends billing statements to donors for scholarship awards.

**August/September:** OSAC disburses scholarship awards directly to the recipient's college.

## Types of Scholarship Funds Administered by OSAC

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1. **Pass-Through Scholarships:** OSAC sends an invoice to the donor shortly after scholarship is established and again in July to cover the balance of current-year awards and scholar support service charge. The minimum award is \$1,000. *Secure payments may also be made at <https://secure2.osac.state.or.us/CCOrders/Donations.aspx>*
2. **OSAC Trusts:** An irrevocable trust fund (endowment) is established at the agency (state), whereby the scholarship award and administrative charge are drawn from the trust and its earnings. OSAC trusts are deposited with the State Treasury. The minimum award is \$1,000. Tax deductible contributions can be made online, anytime, using OSAC's secure donor portal at <https://secure2.osac.state.or.us/CCOrders/Donations.aspx>
3. **The Oregon Community Foundation Scholarships:** OSAC administers more than 330 scholarships in partnership with The Oregon Community Foundation (OCF). Donors establish permanent scholarship programs with endowments of \$50,000 or more where scholarship funds are drawn from the interest earnings. OSAC works directly with OCF to establish scholarship criteria. Ranked among the top community foundations in the nation, OCF has a long history of working with private individuals and groups to support Oregon education. OCF covers the scholar support service charge.
4. **Employer and Membership Scholarships:** Employers, credit unions, electrical co-ops—any business, civic, or membership organization may establish scholarships to support their employees, employee dependents, or membership. Employers and membership organizations may choose to establish a pass-through, trust, or endowment program. (See the Employer-sponsored scholarship fact sheet for details in the Appendix, page 28). The minimum award is \$1,000.

## OSAC Services to Donors and Students

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In administering scholarship programs, OSAC provides the following services:

### **Donor consultation**

1. Initial program set-up to establish the scholarship eligibility criteria and data analysis to determine if the number of applicants will be appropriate.
2. Annual check-in with the donor for confirmation of the award amounts to be distributed and verification of eligibility criteria.

### **Publicity and Outreach**

1. Publicize and market donor scholarships to reach qualified applicants through print materials, OSAC website, and outreach activities throughout Oregon.
  - a. Publish OSAC Scholarship and Grants information materials and send to all Oregon high schools, colleges, state employment offices, and public libraries across the state. Additional copies are handed out at college fairs statewide and financial aid presentations. All scholarship descriptions are announced in the online scholarship catalog on the agency's website at [www.OregonStudentAid.gov](http://www.OregonStudentAid.gov).
  - b. Provide scholarship application workshops at college fairs, College Goal Oregon, ASPIRE sites statewide to serve high school students, college and communities. High

school counselors and other mentors are trained statewide at various professional conferences about OSAC's scholarship program and application.

### **Online Application Processing**

1. Provide a state-of-the-art online application and technology to upload transcripts.
2. OSAC software programmers continue to enhance the application software with features such as:
  - a. An online Student Portal on OSAC's website where students can log-in to check their application, receive notifications, accept/decline their award, update personal contact information, college choice, and college major.
  - b. Providing Oregon high schools access to OSAC's secure web portal to upload or transmit student transcripts to OSAC. The online application system also allows students to upload a scanned image of their transcript to their online application.
  - c. Enabling applicants to update their prior year's application for the current year, saving the student time in entering data the following year.
  - d. Providing an import feature to allow high school seniors to upload their CIS Activities Chart to their online application through a partnership with Oregon Career Information System (CIS).
  - e. Identifying applicants for both merit and need-based programs in OSAC's database who meet each donor's scholarship eligibility criteria to produce the program's qualified applicant pool.

### **Application review and processing**

1. OSAC reviews and processes more than 13,000 applications annually that are received by the March 1 deadline. Each applicant's transcript is reviewed by OSAC staff or experienced volunteers.
2. OSAC notifies applicants who submit their application by the February 15 Early Bird deadline to correct errors and resubmit their corrected application by a specified date.
3. OSAC's research analysts generate database queries that match the donor's scholarship criteria to the student electronic application data fields to create a pool of qualified applicants that meet the donor's scholarship criteria.
4. For scholarship programs that consider financial need, OSAC is the official state record holder of all Oregon FAFSAs (Free Application for Federal Student Aid) filed by students and families. The FAFSA is the national Department of Education application that determines eligibility for need-based federal, state, and campus-based financial aid programs. While insuring confidentiality, OSAC can provide basic levels of financial need of applicants to assist selection committees weighing financial need and merit to aid award decisions.

### **Scholarship Selection Committee**

1. OSAC distributes copies of application materials and an Eligibility List that ranks applicants by GPA and, as required, financial need, to scholarship selection committees.
2. For employer/membership programs, analysis includes initial lists sent to employer-member sites for verification of each applicant's relation to employee or member. In most

cases, OSAC serves as the scholarship selection committee to insure appropriate distance and objectivity between donor and award recipient.

### **Online Retrieval of Scholarship Applications & Online Contributions**

1. OSAC's secure web portal provides donors an opportunity to download application materials and Eligibility Lists, saving paper and mailing time.
2. OSAC's online donor contribution page makes it easy for donors to make charitable contributions by credit card to their scholarship fund.

### **OSAC's Award notification and disbursement steps:**

1. Provide award notification to scholarship recipient, which students may accept or decline on their Student Dashboard. This includes the conditions of the award that the student must acknowledge.
2. Notify colleges that awards have been assigned to specific students and issue electronic fund transfers or checks to colleges. OSAC disburses scholarship awards directly to any postsecondary public, private, nonprofit, and for-profit institutions that accept Title IV federal financial aid in the United States.
3. Invoice donors (pass-through programs) for appropriate scholarship award amounts, track fund balances, and issue annual account statements.
4. Monitor student progress, and receipt returned scholarship monies from colleges if the student drops out or is not eligible for the award.

## **OSAC Administrative Charge**

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OSAC assesses an administrative charge based on the annual award to help cover the cost of administering scholarship programs as described in the previous section. OSAC does not receive funding from the State of Oregon General Fund to administer its scholarship program and the charge helps cover the costs to establish, process, and distribute awards.

## **About OSAC's Online Scholarship Application**

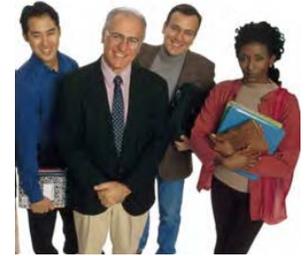
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OSAC offers a single common online application for students to use when applying for scholarships listed in the online catalog. This means students only need to complete one application and submit one set of transcripts, Activities Chart, and Personal Statements, rather than filling out multiple copies of the application. Students may apply for up to twenty scholarships.

**Website Application:** All applications are submitted online at OSAC's website: [www.OregonStudentAid.gov](http://www.OregonStudentAid.gov). Applying online is quicker, easier, and can reduce application errors.

# Section 2:

## Selection Committee & Process



### Role of the Selection Committee

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The primary role of the Selection Committee is to ensure that the donor's philanthropic and charitable wishes are carried out. The Selection Committee is typically comprised of volunteers (educators, donors, persons with expertise or knowledge in a certain field, etc.) who bring to the selection process their life experiences, perspectives, and local knowledge. The committee's role is to evaluate the applications in a fair and consistent manner. Although all scholarship funds have specific criteria, awarding scholarships also requires judgment in assessing the character, motivation, and potential of the applicants. See the Appendix page 29 for the Selection Committee Job Description and Section 3 for tips on evaluating applications.

### OSAC Selection Committee Policy

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OSAC Selection Committees must:

- Adhere to the federal regulation concerning donor involvement issues. (See below)
- Consist of at least three persons
- When applicable, consider committee members with expertise or knowledge in a certain field pertaining to the scholarship (e.g., include at least one architecture professor for an architecture scholarship or a newspaper reporter for journalism scholarship)
- Avoid conflict of interest issues (e.g., relatives, fellow employee, friend of applicant)

(See Appendix, page 31 for Confidentiality and Conflict of Interest Policy)

### Federal regulation: HR4's Affect on Selection Committees

The federal Pension Protection Act of 2006, also known as HR4, has an impact on most of the scholarship programs administered by OSAC. The act means that no more than a minority of the members of a scholarship selection committee may be donors or persons related to donors (includes tax advisors or attorneys representing the donor). OSAC will help donors in every way possible to create a selection process that complies with this legislation and meets the scholarship program goals.

### Confidentiality & Conflict of Interest Policy

The applications that Selection Committees review contain a signed release by the applicant that permits ONLY the committee members to view information that is considered private. Selection committee members must be able to make independent decisions without potential or perceived influence caused by a conflict of interest. Committee members should avoid any situation where personal and business relationships could have, or give the appearance of having, undue influence. In cases of potential conflict of interest, the donor or committee member shall declare the conflict, refrain from the decision-making process, and abide by the written policy. To ensure fairness, all members must verify his/her understanding of the *Confidentiality Policy* (see Appendix, page 31). With the exception of employer-sponsored programs, the donor may serve on the Selection Committee.

## Selection and Awarding Timeline

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**February:** OSAC selection committee chair are sent notification to begin formation of selection committees.

**March 1:** Final deadline to submit the online scholarship application, which includes the applicant's transcript, Activities Chart, four required Personal Statements, and if required, scholarship-specific essays online at [www.OregonStudentAid.gov](http://www.OregonStudentAid.gov).

**April-June:** OSAC emails the selection materials and instructions for accessing the OSAC secure donor portal. Paper copies of these materials can be mailed to committees who request this service, although OSAC recommends online review to reduce costs. Selection materials include an Instruction Booklet with OSAC's Confidentiality Policy, Awarding Form, Fund Guidelines, Eligibility List, and student applications.

Selection Committees meet to select award recipient(s). The committee chair returns to OSAC the scholarship Awarding Form with the name(s) of the award recipient(s) and alternate(s), and the signed Confidentiality Policy (when materials are delivered by postal service or selection committee members do not use the electronic login and password assigned to them).

OSAC notifies the recipient of the award, who may accept/decline the award in his/her *Student Account* online at [OregonStudentAid.gov](http://OregonStudentAid.gov), or in writing.

5. **May-July:** OSAC contacts the donor, provides an invoice when necessary, and confirms the scholarship listing in the coming year's online scholarship catalog
4. **August-September:** OSAC disburses fall term/semester awards directly to each recipient's school.

## Initial Application Screening by OSAC

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OSAC conducts the initial screening of all applications by ensuring correct transcripts are included with the application. OSAC's initial screening does not include a review of the four required Personal Statements, Activities Chart, additional scholarship-specific essays, or GPA verification. This task is entrusted to the Selection Committee to review as part of the selection process.

OSAC provides each Selection Committee with verifiable information on quantitative measures such as academic achievement and remaining financial need. Each committee receives application materials for each qualified applicant named on the accompanying Eligibility List.

## Receiving Application Materials (Online or hard copy review)

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Selection Committees may review application materials online, or if necessary as hard copies.

Viewing application materials online allows committee members to review materials at their convenience when finding time to meet as a group is difficult. This option also reduces agency printing costs, although members are allowed to download the application materials and print hard copies. Instructions for accessing the portal are sent to each member of the Selection Committee who chooses to review online. The committee chair person must request in advance that hard copies of selection materials be mailed or the materials will only be available electronically via the OSAC secure donor portal, at the OSAC website.

Upon final selection, all printed materials must be shredded, or returned to OSAC for shredding, since student information is highly confidential.

## Methodology for Reviewing Applications

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Depending upon the size of the applicant pool, committees may use their discretion in how best to review the applications, following basic OSAC guidelines.

**OSAC requires that at least two committee members review the same application.** Committees may decide how best to efficiently review the applications. Below are two examples.

1. Each committee member reads all applications and ranks the top three to five (depends on how many scholarships to award); and then deliberates until a recipient is chosen.
2. Divide the applications amongst the group, with each member ranking their top two or three (depending on how many to award). Exchange the divided set of applications again, with each member ranking their top two or three from the new set of applications. The members then deliberate until a finalist is chosen from the highest ranking individuals. (Ex: 5-member Selection Committee must review 20 applications. The group divides the applications such that each member reviews 8, to ensure that at least two members read each application)

# Section 3: Evaluating Applications



## Evaluation Tools for Selection Committees

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OSAC provides Selection Committees with several tools for evaluating applications objectively. Each committee receives the following:

1. **Fund Guidelines (Eligibility Criteria Checklist):** represents the donor's intent for the award. Review the scholarship purpose statement and required award criteria. In some cases, donors have prioritized the criteria of what is most important in determining the award recipient. (See Appendix page 24)
2. **Eligibility List:** lists qualified applicants that met the donor's Fund Guidelines criteria. The Eligibility List will generally list applicants by quantifiable elements such as year in school, residency, GPA, and remaining financial need, but cannot rank for qualitative elements such as community service or whether the student's academic performance improved the last two years of high school. A Glossary with terminology and definitions is provided.
3. **Ranking Worksheet.** OSAC will provide a Ranking Worksheet at [OregonStudentAid.gov](http://OregonStudentAid.gov) to help the committee evaluate applicants depending on the selection priorities for the program.

## What to Look for When Evaluating Applicants

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Selection Committees should also look for applicants who demonstrate a connection among his/her academic curriculum (transcripts), volunteer and school activities and work for pay (Activities Chart), and his/her educational and career goals (Personal Statements). For instance, a student whose career goal is to be employed as a nurse should also demonstrate good grades in science and math courses, plus have volunteer or work experience in the health occupations field.

**In evaluating applicants, think long term:**

- What are the applicant's goals?
- Where does the applicant want to be in three to five years?
- How can this scholarship change the applicant's future?

**Identify the intended recipient**

- High achiever
- Financially needy
- From an underserved or underrepresented segment of the population (First-generation college attendee)
- Nontraditional or older returning student
- Dependent of an employee
- Focused on a particular major or career
- Undergraduate student, graduate student, or technical/vocational student
- Plans to attend/or is attending full-time or half-time

- Plans to attend/or is attending a public 2- or 4-yr institution, private nonprofit or private for-profit
- Plans to attend/or is attending a school in state (Oregon) or out-of-state (in the United States)

### **Financial Need**

- Financial need is determined either by Remaining Need or EFC (Expected Family Contribution). College choice (such as community college, 4-year state, or private nonprofit institution) affect a student's Remaining Need.
- **EFC (Expected Family Contribution):** Determined by the FAFSA, EFC is the theoretical familial contribution required by the student's family. Zero is the lowest contribution and represents the greatest need (the lower the number, the greater the need).

### **Academics**

- Cumulative Grade Point Average (GPA) in high school and/or college
- Course rigor (review transcript)
- Standardized test scores
  - The SAT is an aptitude test for reasoning and verbal abilities and has three components: Critical Reasoning, Mathematics, and a required Writing Test. Maximum cumulative score is 2400 (800 points per section. The average cumulative score is 1500 (500 points per section).
  - The ACT is an achievement test, measuring what a student has learned in school. The test has five components: English, Mathematics, Reading, Science, and an optional Writing Test. Maximum cumulative score is 36. The national average is 21.1.

### **Student Qualities**

#### **Goals**

- Sense of commitment
- Shows diligence in completing tasks
- Strong work ethic
- Commitment to field of work or college major as path to a career

#### **Leadership**

- Increasing responsibility
- Leadership in school activities (student government, honor society, service clubs, performing arts, and cultural organizations, and other extracurricular activities)
- Awards and honors earned for leadership
- Athletics

#### **Overcoming Challenges or Obstacles**

- Life experience with a challenge and or obstacle
- Evidence of determination, flexibility, perseverance
- Ability to see support to resolve the experience

### **Creativity/Knowledge/Skills**

- Awards and honors for superior performance
- Evidence of passion
- Writing or public speaking skills
- Performing Arts or visual arts skills

### **Community Service**

- Continuous long-term commitment to community organizations
- Initiation of projects and follow-through
- Demonstrated social awareness
- Service to family (care-giving, transportation, translating)

### **Employment**

- Importance to self and family's economic stability
- Increased work responsibility at long-term employer
- Nature of work

### **Be impartial and fair**

The integrity of the Selection Committee is at stake and award decisions will affect recipients, non-recipients, families, colleges, and communities. Objective selection is required by OSAC and the law.

# Application Materials

The Selection Committee uses the following materials as part of the selection process: Eligibility List (listing eligible applicants ranked according to the scholarships criteria), each applicant’s application, transcripts, Four Personal Statements, additional scholarship-specific essays (if required) and Activities Chart.

## Eligibility List

This sample Eligibility List identifies eligible applicants by previous awardees, followed by undergraduates, and then graduating high school seniors. Each group is then ranked by GPA. The “Glossary” contains the definition of terms used on the Eligibility List .

XYZ Scholarship—GPA														
Eligible Applicants for Academic Year 2012-13														
App ID	Last Name	First Name	Previous Award	Remaining Eligibility	County	High School	HS Graduate	Year in College	College GPA	HS GPA	SAT TOT	ACT	Remaining Need	College
18001	██████	STACI	Y	3.00	CLACKAMAS	NON-OREGONHS	1985	3	3.89				13,934	OREGON HLTH AND SCI UNIV
18002	██████	DENNIS	Y	3.00	WASHINGTON	BANKS	2001	4	3.76				9,782	PORTLAND ST UNIV
18003	██████	MELISSA	Y	3.00	MULTNOMAH	Unkown		2	3.67				7,613	PORTLAND COM COL
18004	██████	THU	Y	2.00	MARION	NON-OREGONHS	1994	3	3.53				10,311	OREGON STATE UNIV
18005	██████	AARON	Y	3.00	MULTNOMAH	LINCOLN	2005	2	2.26				9,782	PORTLAND ST UNIV
18006	██████	ALAN		4.00	WASHINGTON	WILSON	1978	4	3.98				9,782	PORTLAND ST UNIV
18007	██████	AMANDA		4.00	LANE	SOUTH EUGENE	2004	3	3.93				9,782	PORTLAND ST UNIV
18008	██████	CHARLES		4.00	CLACKAMAS	NON-OR GED	1974	4	3.70				30,513	LINFIELD COL
18009	██████	CHRISTOPHE		4.00	MULTNOMAH	NO HS DIPLOMA	2002	1	3.40				13,934	OREGON HLTH AND SCI UNIV
18010	██████	DIXIE		4.00	WASHINGTON	GLENCOE	1995	3	3.38				9,782	PORTLAND ST UNIV
18011	██████	FRANKLIN		4.00	WHEELER	WHEELER	2004	3	3.00				9,037	PORTLAND COM COL
18012	██████	JUSTICE		4.00	CLACKAMAS	LAKERIDGE	2004	3	2.76				36,226	REED COL
18013	██████	MELISSA		4.00	JACKSON	NON-OREGONHS	1984	3	2.69				9,782	PORTLAND ST UNIV
18014	██████	SANDRA		4.00	MULTNOMAH	MADISON	2006	1		3.96	1040		28,930	UNIV OF PORTLAND
18015	██████	STEVEN		4.00	JOSEPHINE	GRANTS PASS	2006	1		3.93	900		9,782	PORTLAND ST UNIV
18016	██████	ALYSSA		4.00	MULTNOMAH	MADISON	2006	1		3.90			9,782	PORTLAND ST UNIV
18017	██████	DAVID		4.00	LINCOLN	WALDFORT	2006	1		3.76			8,510	SW OREGON COM COL
18018	██████	ROBIN		4.00	MULTNOMAH	ALT HS-OREGON	2006	1		3.67			7,613	PORTLAND COM COL
18019	██████	SARAH		4.00	WASHINGTON	HILLSBORO	1996	1		3.45	1040		8,962	PORTLAND COM COL
18020	██████	LORI		4.00	MULTNOMAH	DAVID DOUGLAS	2006	1		3.33		21	10,311	OREGON STATE UNIV
18021	██████	NICOLE		4.00	MULTNOMAH	GRANT	2006	1		3.31		25	10,559	UNIV OF OREGON
18022	██████	STEWART		4.00	WASHINGTON	PORTLND ADVNT	2006	1		3.29	830		17,757	UNIV OF WASHINGTON
18023	██████	GRETCHEN		4.00	MULTNOMAH	MADISON	2006	1		3.09			10,472	SANTA MONICA COL
18024	██████	DANIEL		4.00	CLACKAMAS	ASHLAND	2006	1		3.00		14	11,093	WESTERN OREGON UNIV
18025	██████	GREGORY		4.00	CLACKAMAS	CRATER	2006	1		2.89			7,817	MT HOOD COM COL

Number of Records 25

Other fields available: major(s), career choice, type of college, county, city of residence, graduate GPA—basically, anything on the application

The following pages also include tips for interpreting high school and college transcripts and what to look for in the Four Personal Statements and additional essays. A sample Activities Chart is also included.

## GLOSSARY

The OSAC Eligibility List **contains confidential information, which should not be shared with anyone outside your selection committee.** The report is tailored to the requirements of the scholarship program and may not contain all of the categories described below.

### **4Yr Deg (4-Year Degree)**

Student received a bachelor's degree by July 1 after the March scholarship application deadline.

### **ACT**

The ACT is a national college admission examination that consists of subject area tests in English, Mathematics, Reading, and Science.

Test scores reported by the student.

### **App ID (Application Identification)**

Number used to identify the current year application for an individual student.

### **Career Choice**

Student-supplied information to indicate career field for selected major.

### **Clg GPA (College Grade Point Average)**

Cumulative grade point average across all undergraduate college work. Reported by student.

### **Clg Yrs (College Years)**

Type of college student has selected: 1-year, 2-year, or 4-year.

### **College Name**

The name of the college the student plans to attend for the next academic year. Students are responsible for reporting any school changes to OSAC in writing.

### **Grt App Rcd (Grant Application Received)**

Column checked if student has filed the *Free Application for Federal Student Aid (FAFSA)*.

### **High School**

High school student attended.

### **HS GPA (High School Grade Point Average)**

Cumulative high school GPA provided by graduating high school seniors. OSAC does not capture high school GPA for college students.

### **HS Grad Year (High School Graduation Year)**

Year student graduated from high school.

### **Last and First Name**

Students are listed by last name. The list may be alphabetical but more likely will be by GPA or college year.

### **Major 1 (Major Description 1)**

First major field of study selected by student on application form.

### **Major 2 (Major Description 2)**

Second major field of study selected by student on application form.

### **OR Clg (Oregon College)**

Column checked if selected college is headquartered in Oregon.

### **People ID (People Identification)**

Student identification number used in place of the student's social security number. Use this number to identify awardees on the award reporting form.

### **Pro Clg (Proprietary College)**

Type of college student has selected: will be checked if the school is for-profit.

### **Prv Awd (Previous Award)**

If a student was selected as an awardee for this scholarship previously, this column will be checked. Otherwise, it will be blank.

### **Rmn Elig (Remaining Eligibility)**

Shows how many remaining years this student is eligible to receive this award.

### **Rmn Need (Remaining Need)**

College costs *minus* EFC (FAFSA– Expected Family Contribution) *minus* Federal/State Grants/Vet benefits.

### **Rnw App (Renewal Application)**

For scholarships that offer automatic renewal to recipients, this column will contain a "Y" if the student has completed his/her request for renewal form, mailed each February. Otherwise, it will be blank.

### **SAT 2**

Combined total of two SAT scores: critical reading and mathematics. Scores are student reported.

### **SAT 3**

Combined total of three SAT scores: critical reading, mathematics, and writing. Scores are student reported.

### **YIC (Year in College)**

The year in college the student expects to enter in the coming academic year.

# Interpreting High School Transcripts

Information provided on high school and college transcripts is confidential and may not be disclosed to others outside the Selection Committee.

Print Date: [redacted] Page: 1

**Transcript**

**Grade:** 12  
**Gender:** F  
**Phone:** [redacted]  
**Birthdate:** [redacted]  
**Student ID:** [redacted] **SSID:** [redacted]  
**Birthplace:** USA

**Parent/Guardian Information:**  
[redacted]

**Standard Cumulative GPA:** 3.47 **Weighted GPA:** 3.75  
**Standard Rank:** 144/334 **Weighted Rank:** 129/334

**Oregon Certificate of Initial Mastery:** Apr 01, 2008

Yearly Attendance				
Year	05/06	06/07	07/08	08/09
Present	156.5	160	150.5	120.5
Absent	15.5	11	19.5	9.5

**School District:** [redacted]  
**School Name:** [redacted]  
**School Address:** [redacted]  
**Accredited by:** Schools for G [redacted]

**Graduation Requirements:** High school graduation requirements are identified as MA for math, SC for science, SS for social studies, LA for language arts, etc. The required, earned and remaining credits to be earned in each category are listed.

Graduation Requirements PPS Bus Management 2009				
Area	Area Name	Required	Completed	Remaining
LA	Language Arts	4.000	3.500	0.500
MA	Mathematics	3.000	3.000	
SC	Science	3.000	3.000	
GS	Social Sci / Global Studies	1.000	1.000	
US	Social Sci / US History	1.000	0.500	0.500
EC	Social Sci / Economics	0.500	0.500	
GV	Social Sci / Government	0.500	0.500	
PE	Physical Education	1.000	1.000	
HE	Health	1.000	1.000	
FA	Fine/Applied Arts, World Lan	1.000	1.000	
BMP	Business Management Path	3.000	3.000	
	Other/Electives	5.000	4.750	0.250
<b>TOTAL</b>		<b>24.000</b>	<b>22.750</b>	<b>1.250</b>

Course Title	Mark	Credit Earned	Grad Area	Comp Date	Course Title	Mark	Credit Earned	Grad Area	Comp Date	Course Title	Mark	Credit Earned
<b>06/07 Grade 12 Lincoln H.S.</b> MA 02/06 GEOMETRY S1 A 0.500 BMP 02/06 GERMAN 1 A 0.500 GS 02/06 GLOBAL STUDIES 1 A 0.500 PE 02/06 PHYS ED 1 B 0.500 SC 02/06 PHYSICAL SCIENCE 1 A 0.500 LA 06/06 ENGLISH COM/LIT 2 B 0.500 MA 06/06 GEOMETRY S2 A 0.500 FA 06/06 GERMAN 2 A 0.500 GS 06/06 GLOBAL STUDIES 2 A 0.500 BMP 06/06 INTERNATIONAL STUDIA 0.250 PE 06/06 PHYS ED2 B 0.500 SC 06/06 PHYSICAL SCIENCE 2 A 0.500 <b>GPA 3.68 Credits Earned 6.250</b>												
<b>07/08 Grade 11 Lincoln H.S.</b> BMP 01/08 GERMAN 5 A 0.500 HE 06/07 HEALTH 2 A 0.500 BMP 06/07 INTERNAT'L STUDIES C A 0.250 LA 06/07 PRE IB ENGLISH 4 A 0.500 <b>GPA 3.76 Credits Earned 6.250</b>												
<b>07/08 Grade 11 Portland Public Schools</b> 04/08 OR Cert Init Mastery A 1.000 <b>GPA 4.00 Credits Earned 1.000</b>												
<b>08/09 Grade 12 Lincoln H.S.</b> FA 01/09 IB FRENCH 11-12 A 0.500 FA 01/09 IB GERMAN 7 A 0.500												

**Legend:** AP=Adv Placement H=Hnrs/Accel IB=Intnl Baccalaureate  
 # =Course Repeated, No Credit WF =Withdrawn, Failing  
 WX =Withdrawn, No Penalty WP =Withdrawn, Passing  
 NOTE: AP grades are weighted beginning September, 2008

**Counselor:** [redacted] **Grade:** 12 **Sex:** F **Stu:** [redacted]

**Class rank:** This information helps to evaluate a student's relationship to others in the graduating class. A student with a higher grade point average (GPA) may have a lower than expected rank; this indicates a very competitive class.

**Cumulative GPA:** The cumulative GPA is based upon the number of points earned divided by graded credits attempted.

**Graduation requirements:** High school graduation requirements are identified as MA for math, SC for science, SS for social studies, LA for language arts, etc. The required, earned and remaining credits to be earned in each category are listed.

**Attendance:** Look for a correlation between attendance and GPA. A student who has missed school on a regular basis may mention health or family-related problems in the essays.

**Grades:** Grades are usually the standard "A" through "F" with the occasional "P" for pass. GPA is calculated using only the graded courses. Some high schools add weight to grades for AP or IB courses.

**Abbreviations:** Abbreviations are used in two areas: graduation requirements and course work. Some are difficult to understand. Check the abbreviations used for high school graduation requirements for clues about the courses listed. Also look for "AP" for advanced placement courses, "H" for honors, "Acc" for accelerated, "Adv" for advanced, and "IB" for international baccalaureate. These will signify the rigor of the classes taken.

**College coursework:** Some high school students enroll in classes for which they receive college credit. These courses may be identified with the name of the college (usually a community college). The courses will be identified with college numbering, such as Writing 121, Math 111, etc.

# Interpreting College Transcripts

## University of Oregon

Office of the Registrar 5257 University of Oregon Eugene, Oregon 97403-5257 Phone 541-346-2935

### Undergraduate Transcript

Page 1

Record of: [REDACTED] Print Date: 28-APR-2009 Student Identification: Each transcript offers the following: (1) student name, (2) identification number, (3) course level – freshman, sophomore, junior, senior, or graduate, (4) current major, and (5) degree awarded, if any. ID: [REDACTED]

Date of Birth: [REDACTED]  
 High School: [REDACTED]  
 Admit Term: [REDACTED]  
 Matric Term: [REDACTED]

Transfer Work:  
 07F-08S Umpqua Community College 11.00 Credits

**Transfer students:** Many students attend more than one college in their postsecondary career. Students may transfer after two years at a community college or they may transfer from one four-year college to another. It is important to add the points and credits from all colleges attended to calculate the cumulative GPA

Subject No	Course Title	Credits	Grade	Repeat
<b>Fall 2008</b>				
Psychology Undergraduate				
ASTR 122	Birth/Death of Stars	>3	4.00	W
PHIL 110	Human Nature	>1	4.00	C
PSY 199	Sp St College Connect		1.00	P*
PSY 202	Mind and Society	>2	4.00	C+
SAPP 407	Sem Fetal Alcohol Syn		1.00	P*
Earned Hrs: 10.00 GPA Hrs: 8.00 Quality Pts: 17.20 GPA: 2.15				

**Academic Calendar:** The college transcript is divided into academic terms (quarters) or semesters. During the standard academic year, a school using terms will have three grading periods and one using semesters will have two grading periods. Summer school is a separate entity. Some semester schools also have short January or May "terms" lasting one to three weeks.

Subject No	Course Title	Credits	Grade
<b>Winter 2009</b>			
Undeclared-No major designated Undergraduate			
ALS 101	Intro Univ Study	3.00	A-
EDST 111	Educ Iss & Problems	>2	4.00
MATH 105	University Math I	>4	4.00
PPPM 199	Sp St Amer Philanthrop	3.00	A-
SAPP 407	Sem Teen Pregnancy	1.00	P*
SAPP 407	Sem Intl Drug Smuggling	1.00	P*
Earned Hrs: 16.00 GPA Hrs: 14.00 Quality Pts: 46.20 GPA: 3.30			

**Grades:** College grades are worth a prescribed number of points based on the grade received. An "A" is worth 4 points, a "B" worth 3 points, a "C" worth 2 points, a "D" worth 1 point, and an F worth zero. The points associated with a particular course grade are multiplied by the number of credits for that course to calculate the total points earned for the course. Dividing the number of points earned for all courses by the student's total credit hours determines the cumulative GPA. An "Incomplete" is given in lieu of a grade when a student fails to complete the assignments and has made arrangements with the instructor to make up the work. A "Pass" or "No Pass" is not calculated into the GPA.

Subject No	Course Title	Credits	Grade
<b>Work In Progress:</b>			
BI 132	Intro Animal Behavior	>3	4.00
BI 132	+ Dis	>3	0.00
FHS 215	Expl Family & Hum Serv		4.00
FHS 407	Sem Leadership Develop		2.00
FHS 409	Prac Leader Develop		1.00
MATH 106	University Math II	>4	4.00
MATH 106	+ Dis	>4	0.00
SAPP 407	Sem Human Trafficking		1.00
SAPP 407	Sem Counter Terrorism		1.00

**Credits:** College courses are worth a prescribed number of credits, usually based on the number of hours a class meets per week.

<b>Transcript Totals</b>				
	Earned Hrs	GPA Hrs	Points	GPA
Total Institution:	26.00	22.00	63.40	2.88
Total Transfer:	11.00			
Overall:	37.00			

End of Transcript

Issued to: [REDACTED]



[REDACTED]

University Registrar

THE INFORMATION IN THIS TRANSCRIPT IS CONFIDENTIAL AND SHOULD NOT BE RELEASED WITHOUT THE STUDENT'S WRITTEN CONSENT

# Evaluating Activities Charts

In addition to transcripts and the Four Personal Statements, all scholarship applicants are required to submit an Activities Chart, which documents time spent in three categories: School Activities (athletics, performing arts, clubs), Volunteer Activities (community or home), and Work for Pay Activities. It documents dates, accomplishments, and the time spent on these activities. Use the Fund Guidelines as a guide to determine whether the donor's intent considers extracurricular activities and qualities of leadership, decision making, organizational skills, and areas of special recognition.

In some cases, Selection Committees should look for a relationship between the applicant's Activities Chart and the intent of the donor's scholarship program. If for instance, the donor wishes to award an applicant with strong community service, committee members will want to scrutinize the types of extra-curricular activities and whether the amount of time spent on those activities shows a commitment.

Applicants must enter at least one activity in each category or check a box indicating they have intentionally left the category blank.

**Activity Codes**  
A. School Activities  
B. Volunteer Activities (community/family)  
C. Work for Pay Activities

## Activities Chart

OSAC Scholarship Application

App # (5 digits)   
(eApp users only):

Name:

Act Code	Activity Title	Dates From-To	Time Spent		Responsibility / Accomplishments
			Hours per Wk / Mo	Total Hours	
A	Chamber choir	09/2007 - present	8/wk	720	Sing in 8 concerts and 3 competitions; attend daily class during school year
B	City Library volunteer	06/2009 - 09/2009	20/mo	60	Read stories to toddlers; reshelve books
C	Red Robin Restaurant	07/2009 - present	8/wk	200	Wait tables; cashier for 6 months

# Evaluating Personal Statements and Scholarship Essays

---

For many scholarships, grades and test scores alone will not paint the whole picture of a student's capabilities and potential that may be important considerations for an award. To better assess a student's potential and personal characteristics, OSAC uses the four topics below that are based on "noncognitive variables" developed by William E. Sedlacek of the University of Maryland. Noncognitive refers to variables related to adjustment, motivation, and student perceptions, rather than verbal and quantitative areas typically measured by standardized tests.

The Four Personal Statements also minimize the need for donors to require an essay.

OSAC requires all applicants to complete four personal statements in 150 words or less:

1. Explain your career aspirations and your educational plan to meet these goals. Be specific.
2. Explain how you have helped your family or made your community a better place to live. Provide specific examples.
3. Describe a personal accomplishment and the strengths and skills you used to achieve it.
4. Describe a significant change or experience that has occurred in your life. How did you respond and what did you learn about yourself?

## What to look for in Personal Statements and essays

### **Content**

Does the essay address the required topic?

Does the essay demonstrate deep, independent thought or is it superficial?

What does the essay reveal about the applicant's character, especially in light of the scholarship being sought?

### **Organization**

Is the essay coherent? Is it easy to read?

Do the most important points get sufficient emphasis?

Are individual paragraphs unified, coherent, and fully developed?

## Award Types

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Scholarship awards will be either “one-time” only, “reapply and compete,” or “automatically renewable.”

**One-time only**— awards are just what the name implies. Applicants can only receive the award once, and may not reapply for the scholarship program in the future.

**Reapply and compete**— an applicant who received a previous award from the same scholarship program may reapply and compete for the award. The Selection Committee considers the recipient along with all other applicants in the final pool.

**Automatically renewable**— some awards are automatically renewed for recipients that meet their college’s academic standards and any program-specific renewal requirements. OSAC sends recipients a letter asking to report their college grade point average (GPA), confirm contact information, and confirm the college they are attending. If the student demonstrates satisfactory progress, their scholarship is renewed without the need to reapply and compete with new applicants. OSAC encourages these recipients to apply for other OSAC scholarships through the electronic application.

## Award Amounts

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OSAC does not publicize scholarship award amounts. This allows donors flexibility in awarding at the time of selection. In some cases, endowment interest earnings determine the available funds to award for scholarships.

The scholarship award amount is included in the Selection Committee packet of materials. In some cases, committees are instructed to select multiple award recipients and/or alternate awardees, based on the donor’s intent.

The committee will receive an Awarding Form to record the award recipient(s) and alternate(s). This form is sent back to OSAC. (See Appendix, page 33)

## Notifying Award Recipients

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Once OSAC receives the Selection Committee’s Awarding Form, the student information is entered in OSAC’s database. Recipients are notified by e-mail of their award and given instructions to access their *Student Account* online at [OregonStudentAid.gov](http://OregonStudentAid.gov) which was set-up when they began their electronic application online. Applicants also use their *Student Account* online to check on the status of their application, receive important notifications of scholarship status and awards, confirm their college choice, and to either accept or decline their award. If OSAC does not hear back from an award recipient, electronically, a letter is mailed to the recipient. In cases where a recipient declines the award, the alternate is sent a notification to either accept or decline the award.

## Award disbursements

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The scholarship award is sent to the college and disbursed each term or semester. The first disbursement is in the late summer or early fall at the beginning of the academic year. The disbursement goes directly to the institution to ensure that the funds are used for educational purposes. If the student drops out of school or does not enroll, the unused portion of the award is returned to OSAC and deposited to the scholarship fund.

# APPENDIX

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<b><u>Documents establishing a new scholarship program</u></b>	
Scholarship Fund Guidelines ( <i>Scholarship eligibility checklist</i> ).....	25-28
<b><u>Employer-sponsored program—Oregon Tax Credit</u></b> ..... 29	
<b><u>Selection Committee documents</u></b>	
Selection Committee Position Descriptions .....	30
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Confidentiality and Conflict of Interest Policy .....	32
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<b><u>Selection Committee Applicant Assessment Tools</u></b>	
Ranking Worksheet/Scoring sheet for Academic and Financial Need .....	34
Ranking Worksheet Guidelines .....	36-36

## **Scholarship Eligibility Criteria Checklist (sample form)**



**Office of Student Access and Completion**  
**Scholarship Eligibility Criteria Checklist**

Scholarship Fund Name:

Fund Code:

**Scholarship Purpose (Donor Intent):** *This scholarship was established to....*

<b>1. SELECTION CRITERIA:</b>	<b>State</b>	<b>Note requirement or preference for a particular school or region</b>
<b>a. Eligible Students who can apply</b>	<b>Yes or No</b>	
US citizen or eligible noncitizen		
Oregon resident		
Resident: specific state, county		
Current graduating high school senior		
Prior high school graduate		
College undergrad <i>(if restricted to sophomore or above, please state in the notes section to the right)</i>		
College graduate student		
Prior award recipient		
GED recipient <i>(identified by city/county of residence)</i>		
Home-schooled graduate <i>(identified by city/county residence)</i>		

<b>b. College enrollment/Major</b>	<b>State</b>	<b>Note requirement or preference for a particular college major, course of study, or career field</b>
	<b>Yes or No</b>	
Plan to enroll full-time		
Plan to enroll at least half-time <i>(includes full-time enrollment)</i>		
College Major <i>(list major and whether it is required or preferred in the notes section to the right)</i>		Preference(s): _____ Requirement: _____
Career Field:		Preference(s): _____ Requirement: _____

<b>c. Eligible institutions (where award may be used)</b>	<b>State</b>	<b>Note preference or requirement for a school or region (minimum 2 colleges required)</b>
	<b>Yes or No</b>	
Public Community Colleges <i>(2-year)</i>		
Public Colleges/Universities <i>(4-year)</i>		
Private institution <i>(if private, please select one or both below)</i>		
-Nonprofit institution		
-For-profit accredited <i>(includes vocational/trade schools)</i>		
Located in Oregon <i>(only Oregon)</i>		
Located in the United States <i>(includes Oregon)</i>		

continued page 2 – Scholarship Fund Guidelines

2. SCHOLARSHIP AWARDS	Check One ✓	Years of eligibility to receive award (including initial award year)
Applicant may receive award “one-time” only		
Awardee may reapply & compete		Maximum number of years _____
Auto renewable award		Maximum number of years _____

3. ADDITIONAL SELECTION CRITERIA	Applicant Pool priority for Ranking Report	
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, financial need required.		
FAFSA required, but applicant need not show financial need. Need may or may not be considered.		
FAFSA recommended. Show applicants with both need and no need.		
FAFSA not required by applicant. Need not considered.		
<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		___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>		
<b>b. Dealing with challenges/obstacles</b>		
<b>c. Knowledge/creativity or artistic ability/strengths /skills</b>		
<b>d. Community service/ Leadership/group contributions</b>		
<b>e. Other</b> (e.g., specific essay, student activity, work history)		___Preference ___Requirement

**5. PERSONAL STATEMENT QUESTIONS:** (Personal statement questions below appear on the OSAC scholarship application and are required for all scholarship applicants.)

a. Explain your career aspirations and your educational plan to meet these goals. Be specific.

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 significant change or experience that has occurred in your life. How did you respond and what did you learn about yourself?

**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.

6. DONOR INFORMATION	Check One ✓	Notes
Company or Organizational Logo		

continued Page 3 – Scholarship Fund Guidelines

7. DONOR BACKGROUND STORY		
<p>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.</p>		
8. SELECTION PROCESS	Yes or No	Notes
Selection by Donor group		
Selection by OSAC (employer awards only)		
a. Applicant Pool		
Number of applicants Selection Committee wishes to review		
Number of Alternate Designee(s)		If applicable
Electronic Review of Applications (Yes or No)		
b. Additional Notes/Commentary: (Use attachment, if necessary)		
<p>This section contains the Scholarship Program Description that will appear in the online scholarship catalog: (OSAC will complete this section)</p>		
<ul style="list-style-type: none"> <li>Eligibility</li> </ul>	Scholarship Code..... •	

**Contact Information**

Donor Contact	OSAC Portfolio Coordinator Rachel Cummings 1500 Valley River Dr. Suite 100 Eugene, OR 97401 541-687-7400 Ext: 7387 Rachel.B.Cummings@state.or.us
---------------	--

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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# Employer-sponsored Scholarship Program

## Employers may qualify for the Oregon Tax Credit

Oregon Office of Student  
Access and Completion

### FACT SHEET

### General Program Policies

Employer-sponsored Scholarship program for employees and or dependents of their employees follow the Oregon Administrative Rules (OAR) for Privately Funded Award Programs, Division 60..

A **qualified dependent** is an individual over half of whose support, for the calendar year in which the taxable year for the eligible taxpayer begins, was received from an eligible employee, consistent with the requirements of IRS S 152. The employer and the Commission agree to adhere to Section 117(b) of the Internal Revenue Code and regulation, and must document that employees are not being compensated for employment with such a scholarship, nor being provided an employment incentive. The scholarship should be for exclusively public purposes; its primary purpose is to educate recipients in their individual capacities.

An Employee-sponsored Scholarship administered by the Commission must meet the IRS guidelines for employee-related programs listed below.

#### Percentage Test

An Internal Revenue Service percentage test is used by to ensure compliance to rules and regulations regarding employer-related scholarship programs.

**Number of awards may not exceed 10% of the number of employees** who were eligible, were applicants for the scholarship, and were considered by the selection committee.

**Number of awards may not exceed 25% of the number of employees' dependents** who were applicants for the scholarship and were considered by the selection committee; **or**

**Number of awards may not exceed 10% of the number of employees' dependents** who could apply (this figure should include dependents that do not apply).

### IRS Guidelines for Employer-sponsored Programs

An Employee-sponsored Scholarship administered by the Commission must meet the following IRS guidelines for employee-related programs:

- The program must not be used to recruit or induce employees to continue their employment. The selection committee must be comprised of individuals totally independent and separate from the employer. The members may not be employees or former employees and should be knowledgeable in the educational field.
- Potential recipients must be able to meet the admission requirements of and attend an eligible post-secondary institution.
- Recipient selection must be based on objective standards that are unrelated to employment of the recipient or to the employer's line of work.
- Once awarded, a scholarship may not be terminated if the employee is no longer employed.
- The courses of study for which the scholarship is available must not be limited to those that would benefit the employer.
- Eligibility requirements must be related to the purpose of the scholarship program.
- If a minimum period of employment is required to qualify for Employer-sponsored Scholarship, this period may not exceed three years.

### Oregon Tax Credit

#### Employers may receive a 50% tax credit

An employer participating in an Employer-sponsored Scholarship Program certified by OSAC may qualify annually for an Oregon tax credit. A Tax Credit Certification **Application must be filed no later than October 1** of the calendar year for which a tax credit will be claimed. An eligible employer can be an individual, partnership, or corporation that employs at least 4 full-time equivalent employees, but no more than 250 full-time employees during the calendar year. For each year the scholarship award is disbursed, the employer may receive a tax credit of 50% of the award amount as long as the employer **ALSO** remits a contribution to the scholarship fund during the calendar year for which tax certification in being sought.

This information is  
consistent with rules for  
IRS employer-related  
programs

For more information, contact:  
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## Selection Committee Documents



### Scholarships and Access

#### Volunteer Position Description

OSAC Internal Selection Committee Member

*OSAC provides an online scholarship application for nearly 500 different scholarship programs, and 15,000+ students apply each year. Qualified volunteers comprise the OSAC Internal Selection Committee, and play a vital role in the awarding process by selecting recipients for many of these programs. OSAC provides onsite training and welcomes your knowledge, experience, and participation as a valued member of this Committee.*

#### Qualifications

- Dependability, a strong sense of commitment, and attention to detail.
- Ability to work independently, and as part of a team.
- Experience with application review, scholarship selection and working in volunteer committees is desirable, and an understanding of college financial aid is helpful.

#### Responsibilities

- Attend orientation/training and represent OSAC in a professional manner.
- Review fund guidelines and donor intent to establish criteria for award selection.
- Evaluate applicants in a fair and consistent manner using said criteria.
- Declare a conflict of interest if an applicant is related or well-known to you.
- Use the Ranking Worksheet to help select recipients.
- Maintain the privacy and confidentiality of student information by signing a confidentiality agreement and completing/returning the awarding documents.
- Ensure the destruction of scholarship materials used outside of OSAC.

#### Time Commitment

- The selection process is 16-20 weeks long, with members serving only a part of that time, as is convenient for them. Scheduling is based on availability.
- Members commit to at least once a week, 2-4 hours a day, for 2-4 weeks or longer.

#### Training

- OSAC scholarship services staff provides onsite training.
- Written materials will be provided.

## Sample Scholarship Selection Committee Roster

All committee members must be listed and sign the Confidentiality and Conflict of Interest form.

### Office of Student Access and Completion Selection Committee Roster

#### 566 - Better A Life

Name of Committee Member	Chair	Mailing Address	Elect	e-Mail Address
	<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>	
	<input type="checkbox"/>		<input type="checkbox"/>	



## Confidentiality, Document Security and Conflict of Interest Policy

### Confidentiality and Document Security

The Office of Student Access and Completion (OSAC) believes that it is important for members of scholarship selection committees and staff to maintain the confidentiality of private student information. Protecting the privacy of a students' personal information is also required by state and federal regulations.

1. Scholarship selection committee members will not discuss private student financial or personal information outside of a committee meeting.
2. Committee members will keep all paper and/or electronic application materials (ranking report, applications, transcripts, and supplemental materials) in a secure location or secure computer during selection. When the selection process is complete, paper materials must be shredded or returned to OSAC in a timely manner, and electronic materials must be permanently deleted.
3. Selection committees may retain only student names and award amount information.

### Conflict of Interest

Scholarship selection committee members must be able to make independent recommendations regarding scholarship funds without potential or perceived influence caused by a conflict of interest or even the appearance of a conflict of interest (e.g., when the action of a donor/committee member results in a direct financial benefit to a person closely related to the donor/committee member). They must evaluate the eligibility of applicants without bias and make selection recommendations based on the established objective criteria for each scholarship fund.

1. Applicants must be evaluated based on fair and equitable criteria established prior to the review process.
2. No members of the scholarship selection committee shall be eligible to apply for assistance from the scholarship fund.
3. If a family member<sup>1</sup> of a member of the scholarship selection committee has applied for assistance, that committee member will declare a conflict of interest and will not be present during the review and selection process for that particular awarding cycle.
4. If an applicant (or his/her family) has a financial relationship<sup>2</sup> with a member of the scholarship selection committee, that committee member will declare a conflict of interest, withdraw from the meeting until discussion of that applicant has been completed, and refrain from voting on that applicant.

*I certify that I have read and agreed to adhere to the confidentiality, document security and conflict of interest policies described on the previous page (use additional sheets as necessary)*

---

<sup>1</sup> "Family member" is defined as legal spouse, parent, child/stepchild/adopted child and their legal spouses, grandchild/step-grandchild and their legal spouses, siblings and their legal spouses, niece/nephew and their legal spouses, or in-law.

<sup>2</sup> "Financial relationship" is defined as someone with, directly or indirectly, a business, investment, or family interest such as: an ownership or investment interest in any entity with which the committee member has a transaction or arrangement; a compensation arrangement with any entity or individual with which the committee member has a transaction or arrangement; or a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the committee member is negotiating a transaction or arrangement. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

(Over)

# Sample Awarding Form

## 180-0 - Jefferson High School Awarding Form

CR

Hold award notifications until this date:

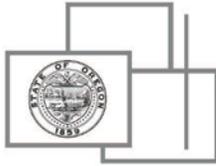
This Awarding Form lists the eligible applicants for this scholarship. Selection committees are required to select recipients from this list only.

App ID	People ID	Student Name	Awardee	Renewal	Renewal Pending	Award Amount	Alternate	Alternate Rank	Score (optional)
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
Records			Total of Awards:		\$				



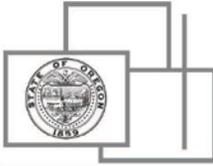


# Selection Committee Ranking Worksheet Guidelines



## Ranking Worksheet Guidelines

Points	CRITERIA
GOOD = 1 BETTER = 2 BEST = 3	<p><b>POTENTIAL SUCCESS:</b> OSAC recommends reviewing Personal Statements, Activities Chart, and transcripts to determine the student's potential for success in pursuing a postsecondary education. A student's personal characteristics and psychosocial development influence the ability to stay in school and be successful. Consider the following:</p> <ul style="list-style-type: none"> <li>• Motivation: demonstrated by goal setting, time management, planning and organizational skills</li> <li>• Social engagement: demonstrated through being respectful, communicating effectively, and working with others</li> <li>• Self-regulation: demonstrated by building self-confidence, recognizing and managing stress.</li> </ul>
1 Has Low Financial need 2 Has Moderate Financial Need 3 Has High Financial Need	<p><b>FINANCIAL NEED:</b> Determined either by Remaining Need or EFC. It is important to consider the variables of each scholarship program. College choice (such as community college, 4-year state, or private non-profit institution) affect a student's Remaining Need. The higher the cost of education at an institution, the greater the Remaining Need. (Need in parenthesis indicates negative, or NO remaining need.)</p> <p><b>Remaining Need:</b> College costs minus EFC (FAFSA- Estimated Family Contribution) minus Federal/Oregon State Grant/Vet benefits. To have need, a student must have 1 or greater (the higher the number the greater the student's need).</p> <p>OR</p> <p><b>EFC (Expected Family Contribution):</b> Determined by the FAFSA, EFC is the theoretical familial contribution required by the student's family. Zero is the lowest contribution and represents the greatest need (the lower the number, the greater the need).</p>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>ACADEMIC SUCCESS:</b> A combination of GPA, test scores, and course rigor</p> <ul style="list-style-type: none"> <li>• GPA &lt; 3.00; SAT/ACT &lt; 1800 or 28. Only taken required coursework</li> <li>• GPA &lt; 3.85; SAT/ACT &lt; 2000 or 30. Moderate academic rigor</li> <li>• GPA &gt; 3.85; SAT/ACT &gt; 2000 or 30. Academic rigor such as AP level courses</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>GOALS:</b> An awareness of the importance of goals and sense of commitment. Shows diligence in completing tasks and strong work ethic.</p> <ul style="list-style-type: none"> <li>• Incidences &lt; 1; little or now indication of working towards goals</li> <li>• Incidences &lt; 2; number of yrs &lt; 1. Values working toward goals</li> <li>• Incidences &gt; 2; number of yrs. &gt; 1. Works towards goals</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>LEADERSHIP:</b> Collaborative abilities; takes initiative, or assumes responsibilities.</p> <ul style="list-style-type: none"> <li>• No evidence of leadership</li> <li>• Leadership &lt; 1 yr; 1 group</li> <li>• Increased leadership &gt; 2 yrs, &gt; 2 groups</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>SPECIFIC FIELD OF WORK:</b> A specific major, career field, field of study or preparation for a job in a specified field as outlined in the Fund Guidelines.</p> <ul style="list-style-type: none"> <li>• Little or no commitment to field of work solicited by the scholarship</li> <li>• Moderately committed to field of work solicited by the scholarship</li> <li>• Strongly committed to field of work solicited by the scholarship</li> </ul>



## Ranking Worksheet Guidelines page 2

Points	CRITERIA
GOOD = 1 BETTER = 2 BEST = 3	<p><b>CHALLENGES or OBSTACLES:</b> A life-experience with a challenge and/or obstacle that produced evidence of determination, flexibility, perseverance, and ability to see support to resolve the experience.</p> <ul style="list-style-type: none"> <li>• No indication or minimal opportunities of challenges/obstacles</li> <li>• Moderate perseverance, flexibility and self-development; Use of personal support resources</li> <li>• Perseverance, flexibility and self-development. Use of personal support services</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>CREATIVITY, STRENGTH, &amp; SKILLS:</b> A demonstrated proficiency or mastery of activities and actions in support of the student's major, career path or goals.</p> <ul style="list-style-type: none"> <li>• Limited indication of strength and skills</li> <li>• Indication of moderate strengths and skills</li> <li>• Indication of extraordinary strengths and skills</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>COMMUNITY/FAMILY SERVICE:</b> Activity and/or identification with a community organization, or family where contributions are made by applicant.</p> <ul style="list-style-type: none"> <li>• Incidences &lt; 1; Little or no value of community service</li> <li>• Incidences &lt; 2; Number of years &lt; 1. Limited value of community service</li> <li>• Incidences &gt; 2; Number of years &gt; 1. Values community service</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>PAID WORK:</b> Indicates the applicant will contribute to his/her education and find successful employment after completing high school.</p> <ul style="list-style-type: none"> <li>• Little or no evidence of having worked</li> <li>• Evidence of having worked responsibly over a moderate time period</li> <li>• Evidence of having worked responsibly over an extended time period</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>SPECIAL INTEREST:</b> A quality identified by the scholarship program as important such as a specific essay, student activity, or work history.</p> <ul style="list-style-type: none"> <li>• Demonstrates little or no interest in a field solicited by the scholarship</li> <li>• Demonstrates a strong interest in a field solicited by the scholarship</li> <li>• Demonstrates a superior level of interest in a field solicited by the scholarship</li> </ul>
GOOD = 1 BETTER = 2 BEST = 3	<p><b>SPECIAL MERIT:</b> Quality of application; strength and skills</p> <ul style="list-style-type: none"> <li>• Little or no contribution/recognition not accounted for in other areas</li> <li>• Some contribution/recognition not accounted for in other areas</li> <li>• Outstanding contribution/recognition not accounted for in other areas</li> </ul>



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