Guidelines for use of Education & General Funds for Scholarships

Purpose and Summary

This document provides guidelines for the administration and award of scholarships from Education & General (E&G) funds and other types of operating funds.

The University provides undergraduate and graduate scholarships to enrolled students using funds provided by alumni, private donors, and federal and state governments. Scholarships may also be funded using E&G funds. The processing of all scholarship disbursements must be completed through the Scholarship System. Deans and unit heads are responsible for managing commitments to such scholarships within existing budgets, similar to any other expense in their units.

Scope

Guidelines for using E&G funds for scholarship awards apply to OSU-Corvallis, OSU-Cascades, Ecampus and other operations receiving E&G budgeted funds.

Background

When Oregon State University was operating under the Oregon University System, E&G funds could not be used to support scholarships for students. With the change in OSU's governance, the use of E&G funds for supporting scholarships is now allowable. This document outlines the requirements and processes for awarding such scholarships.

Guidelines

Scholarships supported with E&G funds must meet the following:

- The scholarship advances a specific goal in the college's mission.
- Scholarship award information is in writing, specifying the purpose, outlining the criteria for eligibility and identifying the procedure for scholarship application and award. All criteria must comply with university policies on financial aid.
- The scholarship applications are reviewed and awarded through a clearly defined scholarship committee or process.
- E&G scholarships may only be awarded by academic colleges. Other units, internal or external to the college, may fund a scholarship in partnership with an academic college as long as doing so is consistent with the unit's mission and advances the mission of the partner college.
- E&G scholarship awards are distributed by the awarding college (not by departments) with the approval of the dean.
- E&G award distributions, following the same distribution process as other scholarships, are through the Scholarship System.
- Statewide Public Services funds and self-support units' operating funds may not be used to fund scholarships awards unless pre-approved by the Provost. Currently, approved exceptions include scholarships awarded by Intercollegiate Athletics.

Process for Awarding E&G Funded Scholarships

The Offices of Financial Aid and Scholarship are responsible for coordinating all aid awarded to students including scholarships awarded by colleges and college-departmental partnerships.

The coordination of all sources of financial aid is required for students receiving federal and state aid, but the financial aid office is also required to track all resources provided to students whether or not they are receiving aid. To facilitate coordination, scholarship awards from E&G funds must be distributed through the Scholarship System using the academic college's scholarship award index. Colleges establishing scholarships using E&G funds should:
- Request a scholarship index be created for the College through the Office of Budget & Resource Planning, if one is not already available. All scholarships awarded within the college will be processed using this index.
- Approval of the scholarship through a request to the Scholarship Director including the purpose of the scholarship, a copy of the established criteria for selection and the process for distributing awards.
- Once approved, the scholarship may be awarded through the Scholarship System.

Specific steps for awarding non-reimbursable (not reimbursed by the OSU Foundation) E&G Scholarships

1. Request an E&G funded scholarship according to policy/guidelines.
2. Contact the Office of Budget & Resource Planning to establish a new E&G Scholarship Index (one Index per college program code 82001) if it does not already exist. The newly established E&G Scholarship Index will be manually added to the Scholarship System.
3. The unit requests a new Detail Code(s) through the Scholarship System using the **College Scholarship Clearing Fund SCLF-xxxx** as the Project ID (see CORE report FND1901 for college-level details). See the Scholarship System step-by-step self-help guide, *create a Detail Code Request* for more information.
4. When the Detail Code(s) is visible in the Scholarship System (overnight load process), the College's Business Center assigns the Detail Code (in the Scholarship System) to one or more Scholarship Administrators.
   NOTE: E&G Scholarships that use the Scholarship Clearing Fund **do not** require submission of a new signer sheet since one exists for current SCLF-xxxx Project IDs. Direct requests for changes to the authorized signer sheets to the BIC Team in Institutional Analytics & Reporting.
5. The E&G Scholarship is now active in the Scholarship System.
6. Submit E&G Scholarship awards using the same process as for other scholarships.

Review and Revision Policy

This policy will be reviewed and revised as necessary or annually by the Office of Budget & Resource Planning and Business Affairs.