



# THE COMMUNITY FOUNDATION

## **Policies and Procedures Manual for Scholarship Selection Committees & Committee Members**

We are grateful for your commitment to the community and to those seeking education and character-building experiences. This manual outlines the various roles of scholarship committees and committee members in reviewing applications against specific criteria, upholding donors' wishes, selecting recipients, notifying the Community Foundation, maintaining proper documentation and record retention. It is understood that scholarship funds administered by the Community Foundation must adhere to certain legislative requirements and for that reason, scholarship committees must agree to the following conditions under which scholarship grants are required to be processed.

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### **Scholarships and their donors**

Scholarship funds at the Rochester Area Community Foundation are created by donors in our community who want to positively influence the lives of those who seek education and character-building experiences. Donors who create and fund these scholarship awards establish specific criteria and guidelines for selecting scholarship recipients. The Community Foundation's first and foremost priority is maintaining these guidelines and ensuring that the intent of the donor is carried out with each scholarship each year. We are entrusted to fulfill their wishes and we appreciate your help, as a scholarship committee member, in carrying out that commitment to them.

### **Committee Composition**

For each scholarship that the Community Foundation administers, committees are created to review applications and select the most appropriate recipient(s) based on the donor's criteria. The Pension Protection Act of 2006 requires that scholarship committees contain a particular structure of members and that these committees be approved by the Community Foundation's Board of Directors annually. Committees can be comprised of community members, members of the field of education, representatives of the Community Foundation, citizens from the greater Rochester area, business owners, athletes, authors, family members, friends and many others. Donors or "related parties" may not constitute a majority of the committee. The Scholarship Administrator must be informed of the names of each committee member for each scholarship fund so that they may be registered as a committee member for that scholarship. Forms for collecting the names of committee members will be sent out when appropriate during the year by the Community Foundation.

### **Your role as a committee chairperson and/or member**

Your role as a committee chairperson or committee member is extremely important because we rely on you to carry out the donor's wishes by selecting the most appropriate recipient(s) for the award. Awarding only the most qualified candidate(s) out of a pool of worthy candidates can be a difficult decision to make and the criteria listed in the scholarship description are designed to help make that selection process easier. If a committee member has a personal connection with an applicant, that committee member must notify the chairperson in advance (if possible) and is not allowed to rate or vote on that pool of applicants. Committee members must evaluate the candidates in an objective and fair manner without influence and pressure.

## **Defining eligibility, selection and application procedures**

Each scholarship that the Community Foundation administers is established using different criteria, application and selection procedures. Since donors establish these funds with certain intents, it is the duty of both the Community Foundation and you to ensure that the expressed wishes of these donors are carried out with each award. The “Scholarship Description” is an important document that describes in detail the scholarship process from beginning to end and should be used as a guide throughout the application and selection process. The process and the criteria for this scholarship have been approved by us in accordance with our governing laws and regulations and must be adhered to. We encourage feedback on the process so that we may effectively serve the donor every year. Scholarship descriptions are created by the Community Foundation and updated every year to reflect any changes to procedures; they are distributed to eligible schools, involved organizations, scholarship committees and the most current versions are available on our website, [www.racf.org](http://www.racf.org), throughout the year.

## **Application and Notification Forms**

Application forms may be maintained by the Community Foundation or by a school, non-profit or local interested organization. The Scholarship Administrator must receive a copy of the most current application form to ensure that the requirements for the scholarship can be met by it. We are happy to provide assistance in creating a form suitable to collecting the information necessary to properly select recipients. Applications contain private information (personal, financial or other) and confidentiality must be upheld. Once recipients have been identified among eligible candidates, the committee chairperson or designee must complete a “Notification Form” and send it to the Community Foundation so that award letters and/or scholarship payments may be made using the information provided.

## **Record Retention & Receiving Documentation**

Paperwork pertaining to scholarships administered by the Community Foundation must be kept in accordance with our Record Retention Policy. Records pertaining to approved scholarships have to be kept for 7 years after the grant period (typically one year for scholarships) and then shredded. Records include applications, required application documents, essays, nomination forms and/or additional forms that show how recipient(s) match the selection criteria listed on the scholarship description. Declined application records have to be kept for three years, after which time the documents must be shredded. Declined applications are applications that are received by the committee for review, but that are not selected due to reasons such as incompleteness and inability to meet the scholarship criteria.

It is important that records of applications, award letters and other documentation related to scholarships be kept according to this timeline. Please let us know if you are unable to maintain these records accordingly.

## **Promoting the scholarship**

Your involved role in the process makes you a wonderful ambassador for the scholarship. Although Community Foundation staff is responsible for all official information distribution, we encourage you to promote the benefit of scholarships to all those seeking aid. Information about all of the scholarships the Community Foundation offers can be found at our website, [www.racf.org](http://www.racf.org).

We appreciate the time and effort you put into helping others. Please feel free to let us know when award dinners and ceremonies are; or even just when your scholarship committee is meeting. We enjoy meeting the many individuals that are involved in the process! Please contact Lori Banning, Scholarship and Grants Associate at (585) 341-4357 or [lbanning@racf.org](mailto:lbanning@racf.org) if you have any questions on the information in this letter or if you would like to discuss the different scholarships and programs that the Community Foundation offers.