IMPORTANT INFORMATION

Scholarship Selection Guidelines

&

Recipient Notification Process

THE COMMUNITY
FOUNDATION

www.racf.org/scholarships

Scholarship Selection

The scholarship caretakers, responsible for facilitating and managing the selection process for the Community Foundation's externally managed scholarship funds, are vital to the success of the scholarship program.

Scholarship Caretaker Roles and Responsibilities

In accordance with Internal Revenue Service regulations, **the scholarship caretaker must assure the Community Foundation of a fair distribution of funds based on a process that allows for fair competition**.

All scholarship programs are established for a broad charitable class and the selection process must be objective and nondiscriminatory. In addition, no donor, member of the selection committee, or anyone related to the scholarship fund's advisors, can receive any material benefit from any award distributed from the fund. Once scholarship decisions are made, the scholarship caretaker is responsible for notifying the Community Foundation.

Selection Committees and Processes

The selection committees for all scholarship funds at the Community Foundation are appointed and approved by the Foundation. In some cases, members may also be recommended by the donor. The committee that reviews applications and selects recipients must reflect the committee that is detailed in the Scholarship Description. Scholarship fund donors and parties related to the donor, including, but not limited to relatives, friends, and employees, may serve on the selection committee, but they may not directly or indirectly control the committee or have a majority vote. Additionally, donors and related parties may not receive an award or any other benefit.

Donors are defined as any individual, family, organization, group, or company that establishes or contributes to a scholarship fund. **Related parties** are the immediate and extended family of the donor and their employees, advisors, attorneys, official delegates, etc. Employer-Related Scholarships are permissible as long as specific requirements are met, including meeting the percentage test (e.g., no more than 25 percent of eligible applicants considered by the selection committee are chosen).

Submitting Recipient Information

Access the Recipient Notification Form by visiting *www.racf.org/ScholarshipAdmin* and clicking on the link under the heading "Submitting Recipient Information". If you have any questions or concerns, please email them to scholarships@racf.org. **IMPORTANT:** There is no specific deadline to complete the notification form; however,

- **Notification forms must be received prior to announcing recipients or sharing award information, and**
- Notification should be provided within two weeks of selecting the recipient(s) and one to two weeks before presenting the award to the recipient or announcing the award privately or publically.

Scholarship Application Storage

Awarded student applications must be kept on file for seven years after the grant period or a total of eight years, and then shredded. **Declined student applications must be kept on file for three years** after the grant period or a total of four years, and then shredded. These applications must be kept **confidential and secure**. If you are currently responsible for saving the applications and cannot maintain them according to these guidelines, please send the applications to the Community Foundation Scholarship Office at 500 East Avenue, Rochester, NY 14607.

Find this information and access vital links at *www.racf.org/ScholarshipAdmin*.

Questions?

Email Lori Banning, scholarship associate, at scholarships@racf.org.

Recipient Notification

Follow the link found at *www.racf.org/ScholarshipAdmin* (under the heading "Submitting Recipient Information"). Click "Apply" to begin the form. *Note the form by default is called an application. Be advised that a separate form will need to be created for each scholarship that you are facilitating on behalf of the Community Foundation; however, only one form can be added to your cart at a time.*

Log in or create an account. Each Scholarship Caretaker will require a unique email that will become his or her User ID moving forward.
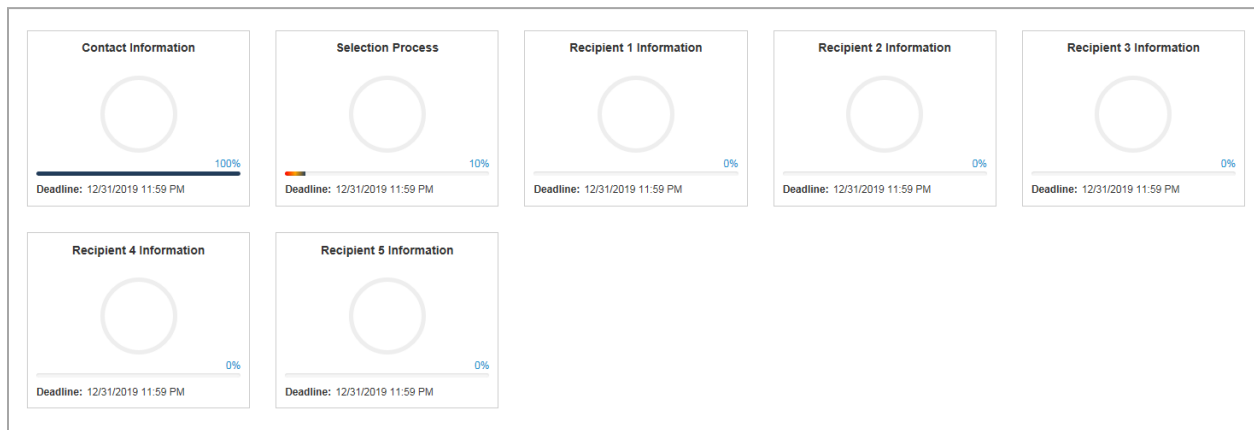

The form will be added to your cart. Choose "Apply" to begin.
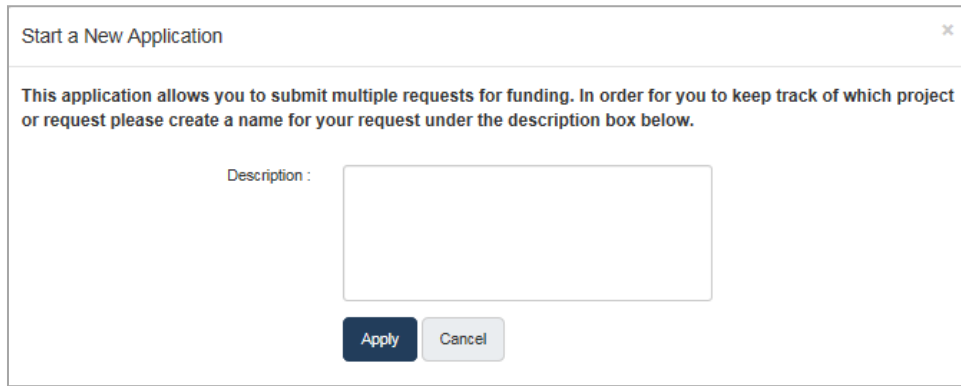
Enter the name of the scholarship and click "Apply." *This step is to help differentiate multiple submissions and is especially important if you are responsible for completing the notification form for more than one scholarship.*
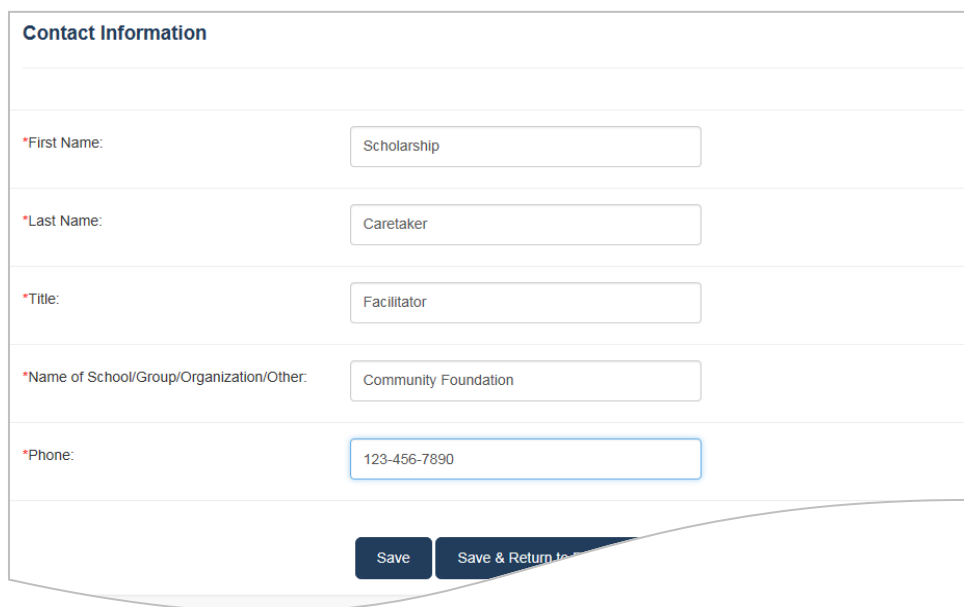

Complete each of the sections in the application to 100 percent. *Once the number of recipients is indicated under the Selection Process, the Recipient Information section(s) will appear.*

Begin the process by completing the Contact Information section. *This is the Scholarship Caretaker information. Note that once this information is entered, it can be imported into new applications by clicking on the "Choose Action" drop down on the top left of the screen.*

Complete the Selection Process information section. This section includes the name of the scholarship, selection meeting information, committee membership, and certification.

Selection Process: Choose the Scholarship Title from the drop-down list. If the award will be presented at the awards night or graduation ceremony, enter the date of the ceremony (used for the printed materials) and the date needed (target date for the pieces to be in hand).

From the drop-down list please select the name of the Scholarship Fund that this form pertains to:

*Name of Scholarship: Select

If the award will be distributed at the awards night or graduation ceremony, please indicate below the date of the ceremony and date the materials are needed.

Date of Award Ceremony:

Please click on the calendar icon to enter date in (mm/dd/yyyy e.g., 01/04/2019 format).

Date Needed:

Please click on the calendar icon to enter date in (mm/dd/yyyy e.g., 01/04/2019 format).

Selection Meeting Information: Enter the selection meeting information.

Selection Meeting Information

*Date of Selection Meeting:

Please click on the calendar icon to enter date in (mm/dd/yyyy e.g., 01/04/2019 format).

*Type of Process: ○ Application   ○ Nomination

*Number of Applications/Nominations Received:

*Number of Recipients Selected: Select

Committee Members: Enter the committee member information. There are enough spaces for up to 15 committee members.

Committee Members

*Please select one descriptor from the list below that **best** described the committee members who participated in the review and selection process (be sure to review the committee criteria in the scholarship description):*

*Committee Member Name 1:

*Link to Committee: Select

Specify Organization/Position/Subject Field:

*Add another committee member?   ○ Yes   ○ No

Certification: Certify that an open, fair, and equitable process was used to select the student(s).

I certify that
- an open, fair, and equitable process was used to select the student(s),
- the criteria of the scholarship as determined by the donor and the Community Foundation were fully met,
- no members of any recipient's immediate family participated in the selection process (HR4) and
- no fund donor or related party directly or indirectly controlled the scholarship selection process (HR4).
- Additionally, the selection process adhered to the provisions of an employer related scholarship.

*Agree to the above certification: ☐ Yes

*Signature:

Enter your name as *"Scholarship Student"* to Confirm your Electronic Signature.

Click "Save & Return to Dashboard."

Save	Save & Return to Dashboard	Return to Dashboard

Then, enter each recipient's contact information, school, and award details.

Recipient Information

*Title: ○ Ms.   ○ Mr.   ○ Other

*First Name of Recipient:

Middle Name of Recipient:

*Last Name of Recipient:

Racial/Ethnic Background:
(Check all that apply)
☐ White Non-Hispanic   ☐ Native Hawaiian or Other Pacific Islander   ☐ Hispanic or Latino
☐ Black Non-Hispanic   ☐ American Indian or Alaska Native   ☐ Asian
☐ Other

*Home Street Address:

*City:

Click "Save & Return to Dashboard."

Save	Save & Return to Dashboard	Return to Dashboard

Click "Submit" when each section of the form is complete.

Choose Action ▾	Submit