

*This worksheet will help you, the fundholders, address items that need to be considered in setting up a scholarship fund at the Bartlesville Community Foundation (BCF). BCF staff is happy to work with you in determining how to best fulfill your intent.*

**1. Name of the Scholarship:** *You may name your scholarship fund. It could include a family name, the name of someone you are memorializing, the name of a school, etc.*

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**2. Purpose of the Scholarship:** *This is a statement that specifies what the scholarship fund will support.*

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**3. BCF General Requirements:** *These are the items each scholarship applicant will be required to provide.*

- Student name, address, e-mail, phone number
- Official transcript
- FAFSA – First two pages to include SAI
- Awards and Honors
- School Clubs
- Extra-Curricular Activities
- Employment History
- What are your college plans?
- Are you related to any BCF staff, Board member, or Committee member?

**4. Nomination vs. Application:** *Applicants will be considered for your scholarship either by nomination or application. If by application, the BCF staff will work with you to draft an application that will be housed on the BCF's website.*

I/We intend for this award to be made based on: (select an option below)

nomination       application

If by nomination, please describe your intended process below:

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**5. Eligibility Criteria:** *These are the general criteria used to determine whether a person is qualified to apply. BCF encourages you to provide as much flexibility as possible by recommending eligibility criteria that are not so narrow that it may be difficult to award a scholarship from the fund every year. Possible eligibility criteria might include financial need, specific high school, academic merit, interests, athletic involvement, major of study, etc.*

Please list at least three eligibility criteria for the scholarship:

1. \_\_\_\_\_

2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

6. **Selection Criteria:** *The selection criteria are the specific standards used to identify the most qualified applicants who will ultimately be recommended for a scholarship award. Possible selection criteria might include a minimum GPA, an essay addressing a specific question, letters of recommendation, etc.*

Please list at least three but no more than six, selection criteria for the scholarship.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

7. **Award Amount:** *The size of the award will be determined by the funds available. You may suggest a minimum amount, or you may prefer to suggest that the amount be determined annually. Select an option below:*

I/We would like the scholarship to be in the predetermined amount of \$\_\_\_\_\_.

or

I/We would like the scholarship amount to be determined annually by the funds available to spend as outlined by the Spending Policy.

8. **Award Duration:** *You may decide whether the scholarship is a one-time award or split over many semesters. If it is split, the BCF requires the recipient to submit a transcript before additional payments are made. Select an option below:*

I/We would like the scholarship to be a one-time award.

or

I/We would like the scholarship to be split over semesters as follows:

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9. **Award Renewal:** *You may decide whether to allow a scholarship recipient to renew their award. This can be done automatically with submission of a transcript, or they can be required to apply again. As you think*

*about this, you will want to consider whether it is important to you that new recipients are selected each year. Select an option below:*

YES / NO – I/We would like the scholarship recipients to be able to renew their award by [submitting a transcript / submitting a new application]. (circle one)

**10. Award Recommendations:** *You are welcome to be part of the application review process as a subcommittee. Your recommendations will be forwarded to the BCF Scholarship Committee. Select an option below:*

YES / NO – I/We wish to be involved in the award review and recommendation process.

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#### **SCHOLARSHIP APPLICATION AND REVIEW PROCEDURE:**

1. Application material is provided on the BCF's website.
2. Students must apply and submit all required supplements by the deadlines provided.
3. BCF staff organizes the material and provides it to the appropriate subcommittees.
4. Subcommittees make award recommendations to BCF Scholarship Committee.
5. BCF Scholarship Committee makes final recommendations in a report to the BCF Board, and BCF Board makes final decisions.
6. BCF staff notifies awardees either at an awards assembly, via e-mail, or via mail.
7. Awardees must return a scholarship acceptance form which includes their school information and the terms of the award.
8. BCF staff sends scholarship payments to the awardee's school of choice.

#### **POLICIES THAT GUIDE THE BCF'S SCHOLARSHIP PROGRAM:**

- Scholarship Policy
- Gift acceptance policy
- Donor Initiated Fundraising Policy
- Conflicts of Interest Policy

\_\_\_\_\_  
(initial)

I/We acknowledge that no person related to us may be eligible to receive or benefit from this scholarship.

