

# **SUL ROSS STATE UNIVERSITY**

*A Member of the Texas State University System*

## **SRSU Policy: Scholarship Policy and Procedure Manual**

**SRSU Policy ID: APM 2.31**

**Policy Reviewed by: Vice President for Enrollment Management**

**Approval Authority: Executive Cabinet**

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### **General Information**

The Sul Ross State University Scholarship Policy and Procedures Manual outlines the processes and procedures for awarding endowment scholarships. This process excludes university excellence funds, state (e.g. Texas Higher Education Coordinating Board scholarships), and/or federal grants because these types of funds typically require a particular set of criteria to be used for awarding purposes.

Freshmen and transfer institutional scholarships are used for recruiting purposes and will follow a fair and equitable process.

### **Administration of Scholarships**

#### **I. Policy**

- a. A variety of scholarships are offered through Sul Ross State University Financial Aid Office, as well as through college and academic department levels. Scholarships must be established and awarded in accordance with the rules and regulations of the Board of Regents of The Texas State University System. Establishing scholarship selection criteria is a negotiation process that takes place between the donor and the Office of External Affairs, in cooperation with the Scholarship Office and any involved academic unit at the time a gift is made to establish a scholarship. The criteria must be carefully developed to ensure that both university and donor objectives are met. Ideally, maximum flexibility will be given to the University for selecting recipients. Criteria may include, but are not limited to, GPA requirements, standardized test score minimums, financial need, major or area of study, enrollment hours, and extracurricular activities. The donor may also elect to make the scholarship renewable and define conditions under which renewal may occur. The donor may not name a specific student to receive a scholarship. Once criteria are agreed upon, the Office of External Affairs will prepare the Agreement, which is then signed by the donor and the SRSU President, Vice President for External Affairs (VPEA), or RGC Associate Provost. Upon signing, a copy of the Agreement will be sent to the Scholarship Office and to any involved academic unit.

#### **II. Award Procedures**

- a. Adequacy of Funds

The availability of each scholarship must be advertised through the Scholarship Office and/or through the appropriate area(s) for which the scholarship is designated. Prior to advertising any scholarships, the awarding unit is responsible for checking account

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balances to verify the availability of funds. The awarding unit should maintain the account and is responsible for the account balances. Scholarships from annual gifts should not be awarded if funds have not been received for the year of award. For endowments, awards can only be made based on the amount of earnings by September 1 of the academic year of the award. Awards will be made to the extent of available fund, thus not all students meeting the minimum requirements will be awarded a scholarship.

## b. Scholarship Deadlines

All scholarships administered through colleges, schools, departments or the Scholarship Office should be awarded in a timely manner. If at all possible, scholarships should be awarded no later than May 31. This deadline is necessary to facilitate coordination of financial aid and scholarships in awarding scholarships to students receiving need-based financial aid.

## c. Donor Agreements

All contributions, including those accepted by colleges, schools, and departments, will be processed through the Office of External Affairs. Full reporting and approval procedures for acceptance of private gifts from all sources, including individuals, foundations, and corporations, must be followed. Contact the Office of External Affairs for further guidance. All scholarships must have either a signed scholarship agreement from the donor or a Memorandum of Understanding between the coordinating unit and the Office of External Affairs.

### **Development of New Scholarship**

1. All potential donors expressing interest in funding a scholarship are referred to the Office of External Affairs or to the Associate Provost's office at RGC.
2. Donor meets with Office of External Affairs/RGC Associate Provost and negotiates scholarship endowment agreement (Agreement) including all scholarship eligibility requirements.
3. Office of External Affairs will draft the Agreement.
4. Agreement may be signed by SRSU President, Vice President for External Affairs, or RGC Associate Provost and Donor. Funds are collected from donor.
5. Agreement and funds are sent to Office of External Affairs.
6. Office of External Affairs deposits funds and notifies Finance. A copy of the Agreement is provided to Finance and Financial Aid. Finance requests FOAPAL number from Accounting.
7. Accounting creates FOAPAL and Accounts Receivable Detail Code.

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8. Accounting notifies Financial Aid of the Detail Code.
9. Financial Aid creates Banner FA Fund Code and builds scholarship in Banner and Academic Works.
10. Financial Aid includes scholarship in the University's Scholarship Brochure or lists it on RGC's FA web page.

## **Creation and Funding of New Scholarship**

Steps after the Agreement has been executed:

1. Requests for new FOAPALs are presented to the Finance Office by the Office of External Affairs usually accompanied by a copy of a donor check or a new Agreement.
2. The VPFO will send a request to Accounting Services to create the FOAPAL and includes data such as account manager, account function, and account fund group.
3. Accounting Services will create the FOAPAL as well as a detail code for fund raising and will send a memo out to all involved parties with the resultant information.

## **Records Retention**

Compliance for records retention according to State of Texas records retention schedule.

1. Applications of students that were not selected for an award have to be maintained for the scholarship cycle plus one year.
2. Applications and support for awarded students must be maintained for AC + 1, which translates to one year after the completion of the total duration of the scholarship for awardees.

## **Colleges, Departments, and Other Scholarship-Granting Units**

While Financial Aid Office administers and awards many university scholarships, students can receive SRSU scholarships, fellowships, grants, or awards from other scholarship-granting units. The University Scholarship Committee annually reviews the award process for each scholarship/fellowship-awarding unit. Currently recognized scholarship-granting units other than SRSU Financial Aid Office include the following:

1. Graduate Center
2. Academic Colleges
3. Departments
4. Other Administrative Units
5. Campus Organizations
6. Rio Grande College

Scholarship-granting units are responsible for ensuring that their respective scholarship award process is fair and equitable and in compliance with pertinent rules and regulations. At a minimum, each scholarship-granting unit must establish and maintain:

1. A scholarship award committee to assist with the evaluation and selection of their scholarship winners

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2. Documentation of their scholarship award process
3. Respective scholarship account(s), including regular reconciliation
4. Scholarship award records in compliance with record retention requirements
5. Competitive tuition waiver certification if pertinent
6. Timely award notification to SRSU Financial Aid Office

The University Scholarship Committee recognizes the RGC Awards Committee as the designated executive agency of the Rio Grande College campuses in matters related to scholarships and awards. It is the function of this committee to encourage, develop, and evaluate Rio Grande College scholarship programs. The Committee grants student Non-resident Tuition Exemptions for competitive scholarship recipients only. The secretary of the Rio Grande College Scholarship Committee is the Assistant Director of Financial Aid or his/her designee.

## **Role and Responsibilities of the Scholarship Coordinator**

The Scholarship Coordinator serves as a central point of contact for awarding scholarships and is responsible for the following:

- Manage all online scholarship application processes.
- Update scholarship information/criteria on Office of Financial Aid's website.
- Collect and distribute scholarship information/applications to the University Scholarship Committee.
- Communicate scholarship criteria to the University & Departmental Scholarship Committees regarding scholarships to be awarded.
- Communicate procedures for the scholarship awarding process to students, faculty and departments.
- Distribute scholarship account information to the University & Departmental Scholarship Committees for the purpose of determining how many awards may be made for each fiscal year. The University Finance & Operations Department is responsible for providing a detailed scholarship account and recommended funds available report to the Scholarship Coordinator for this purpose.
- Verify that students selected for scholarships meet the specific criteria set in accordance with donor intent.
- Maintain records/documentation to ensure adequate support of scholarship awards.
- Maintain records/documentation of the evaluation and ranking of scholarship applicants.
- Maintain records/documentation of those who participated in the application evaluation and their concurrence with the list of scholarship awards.

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- Maintain records/documentation of the acknowledgement of those participating in the applicant selection process.
- Retain documentation for the length of time required by the *Sul Ross State University* records retention schedule.
- Monitor processes to ensure that the University & Department Scholarship Committees are in compliance with university-wide scholarship procedures.
- Responsible for notifying all students of their awards and processing Post-Scholarship Acceptance requirements.
- Responsible for collecting donor thank you notes and forwarding them to the Office of External Affairs.

## **Scholarship Application Process**

- Students who are interested in applying for scholarships for the upcoming academic year (fall and spring semesters) must complete and submit a Scholarship Application Form online via the Financial Aid website. A deadline for applications will be determined by Financial Aid. Students may apply for scholarships when they have started the application process for admission to the university.
- To access the online scholarship application, students must have their LoboID and password.

## **Scholarship Selection Process**

- Scholarship awards are made for one academic year, with the exception of renewable scholarships. Awards are made for both fall and spring semesters simultaneously, unless the criteria specifies otherwise, or committee members agree to make justifications for a graduating student on their last semester of studies. Students will receive one scholarship disbursement per semester. Students awarded a scholarship for the spring semester only will receive the full amount of their scholarship award in one disbursement. Please note: The aforementioned process does not replace the donor's intent as outlined in the specified scholarship criteria.
- The university & departmental scholarship committees will receive all scholarship applications and detailed scholarship report including funding amounts and criteria to award for the upcoming academic year.
- Each scholarship committee member is responsible in submitting their respective ranking for each qualified applicant. The chair of each committee will make the final selection based on the committee member's rankings by offering the scholarship to the student via the AcademicWorks system. University & Departmental Scholarship Committees will have a minimum of two work weeks to convene to assess applicants and select recipients after being provided all qualifying application materials.
- The scholarship application process may be re-opened if the committees have not exhausted their scholarship funding after reviewing all eligible applicants who met the initial deadline.

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- The scholarship application can also be re-opened if the recipient declines the scholarship or becomes ineligible.

## **Scholarship Awarding Criteria**

- Students must enroll in the required number of hours for the scholarship term, be in good standing with the university and meet Satisfactory Academic Progress to receive a scholarship disbursement.
- There is no limit set regarding scholarship offers; however, the committees are permitted to determine the number and amount of scholarship to be awarded each year.
- The amount of the scholarships and other financial aid cannot exceed state and federal regulations or, in any case, exceed the estimated cost of attendance as determined by the University through the Office of Financial Aid.
- Awards will be processed in BANNER after the scholarship Coordinator delivers the names and IDs of recipients to the Office of Financial Aid.

## **Award Notification Process and Scholarship Acceptance Requirements**

- All scholarship recipients will receive an email of notification through their Sul Ross email and a flash message within the AcademicWorks scholarship system. These messages will be automatically generated through AcademicWorks.
- Students must accept or decline their scholarship within the time frame indicated on the scholarship offer notice from the AcademicWorks scholarship system. Failure to do so will render the scholarship offer invalid and the scholarship will no longer be available for the named student. The review committee can then re-award the scholarship to another student.
- Students are encouraged to write a thank you note(s), even if they are not required per donor criteria.
- The Scholarship Coordinator will notify the committees of any unclaimed scholarship offers.

## **Competitive Scholarship Waivers**

- Section 54.064 of the Texas Education Code provides for a competitive scholarship waiver of non-resident tuition for a non-resident or international student who receives a competitive scholarship totaling at least \$1,000 (the \$1,000 can be a combination of several smaller scholarships or a single Sul Ross State University Scholarship). A competitive scholarship waiver allows the qualifying student to pay the fees and charges required of Texas residents without regard to the length of time the student has resided in Texas. In order to qualify as a competitive scholarship for purpose of the waiver, the student must compete with other students, including Texas residents for the scholarship and the scholarship must be awarded by a scholarship committee officially recognized by the university president and is approved by the Texas Higher Education Coordinating Board under criteria developed by the Board. Competitive scholarships must be awarded in accordance with factors set forth in a written policy and published in the

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University catalog or the Financial Aid website in advance of any scholarship application deadline.

- Competitive scholarships may be awarded by the University Scholarship Committee or by a Departmental Scholarship Committee. Committees awarding competitive scholarships must have at least three members, must vote in making awards and must keep minutes of committee proceedings. A committee awarding competitive scholarship under an alternative process must set out the process in writing and have it approved by the Scholarship Coordinator prior to any awarding of scholarships. A college or department issuing a competitive scholarship waiver must be able to demonstrate that the requirements of a waiver have been met. Scholarships open only to Texas residents are not considered competitive scholarships and do not provide a waiver of tuition. External scholarships (non-university awarded) are not eligible for the competitive scholarship waiver.
- A waiver based on a competitive scholarship award lasts for the period of the scholarship (up to a 12-month period). A student who qualifies for a competitive scholarship waiver during fall and spring may also qualify for the waiver during the summer term(s) if the award is made for an 'academic year.' A recipient must be notified in writing by the Scholarship Coordinator and Scholarships of the term(s) in which a waiver is in effect. If a scholarship is terminated, the corresponding waiver is also canceled automatically. If a scholarship is to be issued in multiple disbursements and is less than \$1,000 when an award is terminated, a student does not owe a refund for the tuition that has been waived, since the waiver was granted in good faith. However, the waiver shall be canceled for the term(s) for which the scholarship is no longer applicable. A competitive scholarship waiver is not applicable from one fiscal year to another; a student must qualify for the waiver each fiscal year.
- The Scholarship Coordinator is responsible for maintaining a list of approved competitive scholarships to ensure that awards are disbursed to students in accordance with federal, state and institutional regulations and for audit purposes.

## **Continued Eligibility**

- After fall official grades are determined, warning letters will be sent to scholarship recipients (via Sul Ross email) who have GPA and enrollment status issues.
- Satisfactory Academic Progress (SAP) [completed hours and Grade Point Average (GPA)] will be checked yearly at the end of the spring semester. The SAP process will not replace the donor requirements as specified in their outlined scholarship criteria.
- A SAP notification letter will be sent to all students (via Sul Ross email) who did not maintain their eligibility requirements for the academic year. This notification will inform students of the financial aid appeals process. A list of ineligible students will be generated from BANNER.

## **University Excellence Funds**

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- University Excellence Funds may be used for scholarships/achievement awards as well as other expenditures.
- Criteria for Excellence funds are determined by departments.
- A student does not need to submit a scholarship application in order to receive an excellence award, but are required to be enrolled full-time.
- Out-of-State students may not receive a competitive scholarship waiver from receiving an excellence/achievement award.

## **Scholarship Account Information**

- The University Finance & Operations Department will be responsible for providing the Scholarship Coordinator with a list of scholarship funds balances available to award each fiscal year. Under no circumstances can the scholarship committees exceed the recommended amount the Finance & Operations Department reports to the Scholarship Coordinator.
- The Scholarship Coordinator will review the report to ensure that all necessary scholarships are included in the report. This office will distribute the report to the University & Departmental Scholarship Committees.
- The Committees will determine how many scholarships to award per scholarship account and the amount of each scholarship award. All awards will be made in compliance with the donor's intent as stated in the donor's agreement with the university.