

SCHOLARSHIP & AWARD POLICY



Foundation

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To ensure all scholarships and awards offered through the University of Wisconsin Oshkosh Foundation ["Foundation"] are awarded in an objective and nondiscriminatory manner and in abidance of University of Wisconsin System, state, and federal guidelines, the following procedures must be followed in awarding of scholarships and awards to University of Wisconsin Oshkosh ["University"] students and employees:

I. SCHOLARSHIP FUNDING

- A. No awards shall be posted for applications until the funding has been received by the Foundation.
- B. It shall be the responsibility of the UW Oshkosh Office of Advancement scholarship coordinators to facilitate annual payments from scholarship donors.
- C. The amount and number of awards will be determined annually by the scholarship coordinators based on available funding and any guidelines established in the fund's agreement.

II. SCHOLARSHIP CRITERIA

- A. All scholarship funds shall be established for education-related purposes pursuant to a written agreement between the donor and the Foundation.
- B. Scholarships shall only be awarded to students admitted or enrolled at UW Oshkosh. Admitted students who are awarded scholarships are only eligible to receive the award payment if they enroll as an undergraduate or graduate student at UW Oshkosh. Scholarships cannot be made to non-UW Oshkosh students or to high school special students who do not enroll as undergraduates at UW Oshkosh.
- C. Scholarships must be awarded on an objective and nondiscriminatory basis. Scholarship criteria and conditions may be based on merit, need, or any other reasonable and legally permissible requirement, but the group of eligible recipients must be large enough that an indefinite number of individuals may benefit. To ensure that scholarship criteria are sufficiently broad as well as compliant with UW Oshkosh guidelines and government regulations, a member of the UW Oshkosh advancement staff will work with the scholarship donor or University department to establish award criteria.
 - i. Limitations based on gender, race, national origin, or similar characteristics pose special considerations and may require legal consultation before allowing such limitations to be included in scholarship criteria.
- D. If a scholarship fund is established internally, that fund and any scholarships offered through that fund must go through the scholarship approval process.

- E. It is an institutional priority to provide scholarship funding to aid in recruitment and retention of students. Any scholarship funds in which the institution has input or control over award criteria shall be as broad as possible to aid in the recruitment and retention of the maximum number of students. These scholarship programs shall be evaluated periodically to ensure these resources are being utilized as effectively as possible. Should a scholarship not show a positive impact on recruitment and/or retention it shall be eliminated or modified.
- F. Per NCAA Division III regulations, athletic leadership, ability, participation or performance shall not be considered in the awarding of scholarships. Because of this, applicants and their references should not include information on athletic involvement on their scholarship applications. If athletic involvement is included on a scholarship application, the selection committee members shall disregard that information. UW Oshkosh coaches are not allowed to provide references for student athletes or serve on scholarship selection committees.
- G. Unless otherwise defined in award criteria, it is understood that “part-time enrollment” refers to the University's official number of credits required for part-time enrollment. Criteria stating that full-time enrollment is not required, indicates that a student may be enrolled in any number of credits.
- H. It is preferred that donors not define required application materials in their scholarship fund agreement as to allow application materials to change as needed.

III. SELECTION

- A. Award recipients must be selected by a committee composed of at least two members. It is preferable to have an odd number of committee members to ensure a tie-breaking vote. The only circumstance in which a committee is not required is if selection is based on a measurable factor such as highest grade-point average in a specific major.
- B. In order to avoid potential tax implications due to IRS regulations that impact donor involvement post-gift, scholarship donors or interested parties shall not participate in the selection process. This includes members of an organization that has established a scholarship fund, such as an alumni association group. Any donors or interested parties involved in selection prior to January 1, 2019 will be allowed to continue their participation so long as they do not have a majority say in selection of the award recipient.
- C. To ensure recipients are selected fairly and in accordance with the documented scholarship criteria, the scholarship coordinators will confirm eligibility for each award recipient.
- D. If the selection committee cannot decide between two equally qualified applicants, the award may be split between two applicants, provided splitting the award is not prohibited by the fund criteria. However, every effort must be made to identify the most worthy applicant for the award. It shall not be permissible to split an award between more than two applicants.
- E. Each scholarship selection committee must make every effort to follow the designated selection timeframe. Should a committee fail to notify the Foundation of the award recipient

in a reasonable timeframe, the Foundation shall appoint an internal committee to select a recipient.

IV. AWARD DISBURSEMENT

- A. All scholarships and awards must be applied directly to the recipient's student account. No cash awards are allowed. Gift cards, including textbook gift cards, are considered cash awards.
- B. Once the review committee has selected the scholarship recipient(s), a scholarship disbursement form, signed by the fund's authorized signatory on record, must be submitted to the Office of Advancement in order for the award to be processed.
- C. Should a student no longer be eligible for an award prior to disbursement, the award will be made to an alternate indicated by the selection committee. The department will be notified of this situation before the award offer is made to the alternate.
- D. Repayment of awards shall not be required, should a student no longer meet the requirements of the award following the semester of award disbursement.
- E. Scholarship coordinators will manage the award renewal process and will share recipients' eligibility information with the appropriate departments prior to final award approval and notification.
- F. Unless otherwise specified in scholarship criteria, if a student does not qualify for their award renewal, a replacement shall not be selected to take their place. Because of the complexity of renewable awards, it is preferred that the funding carry forward to fund new scholarships made in subsequent years.
- G. Unless otherwise defined in the award criteria, the full award will be paid out in the upcoming fall semester. If the award criteria necessitate earlier disbursement, the award will be paid out in the current spring semester. If an award exceeds the cost of tuition for one semester, the award will be evenly split between the fall and spring semesters of the upcoming year.
- H. If the donor instructs an award be split between the fall and spring semesters and the recipient will not be enrolled during the spring semester, the student will forfeit the spring installment, unless otherwise defined in the award criteria.
- I. If a scholarship recipient requests their fall semester award be split between the fall and spring semesters, that shall be permissible.

V. AWARD COMMUNICATION

- A. No award offers shall be made to students until an Office of Advancement scholarship coordinator has had the opportunity to verify the eligibility of the recipients. All students will receive official award offers through Academic Works. Departments may send supplemental

award information or congratulations only after the award offers have been made through Academic Works, unless prior approval has been given by a scholarship coordinator.

- B. As part of the award offer, advancement staff will provide the recipient with the donor's contact information and will encourage them to acknowledge the donor's gift.
- C. Advancement staff will provide the donor with the recipient's directory information and post-acceptance submission. In some cases, portions of the student's scholarship application may be provided at the request of the donor.

VI. RECIPIENT RECOGNITION

- A. All UW Oshkosh scholarships and awards will be included in the annual UW Oshkosh Scholarship Reception, or subsequent recognition event, provided they meet the minimum award criteria to be included.
- B. Advancement staff will invite scholarship recipients and the donors of their awards to the event.

VII. ACADEMIC WORKS

- A. Academic Works is the scholarship software management system currently used by UW Oshkosh and the Foundation. All UW Oshkosh scholarships and awards will be advertised in Academic Works.
- B. All scholarships that require an application must be applied for through Academic Works.
- C. Awards that do not require an application will be processed in Academic Works after the recipient has been selected.

VIII. SCHOLARSHIP APPLICATION AND SELECTION CYCLES

- A. There will be two annual scholarship application cycles, one for currently enrolled students and one for incoming students who have been admitted to the University.
- B. The cycle for current students shall be completed within the fall semester.
- C. The cycle for incoming students shall be completed early in the spring semester to ensure award offers are made early enough to impact potential students' admission decisions.
- D. Exceptions for individual awards may be made to this timeline at the discretion of the scholarship coordinators should the need arise due to the nature of the award, such as study abroad scholarships.

- E. Specific scholarship deadlines will be set by the scholarship coordinators based on the academic calendar and in consideration of financial aid deadlines.
- F. Every effort must be made to select scholarship recipients prior to the start of the semester the awards shall be paid out. It is important for financial aid procedures that awards be included in financial aid packages prior to tuition payments being due.

IX. AWARD BILLING

- A. Scholarship disbursements shall be reconciled by University personnel and billed back to the Foundation at least once per semester.

X. UW SYSTEM POLICIES

- A. All scholarships and awards are subject to current and future policies and guidelines established by UW System.
- B. UW System policies and procedures shall supersede any documented scholarship policies and procedures.

XI. NON-ACADEMIC AWARDS MADE TO UNIVERSITY PERSONNEL

- A. Per UW System guidelines, the Foundation shall not make an award payment directly to a University employee. Employment-related awards, such as an outstanding employee award, made to a University employee must be paid through the University's payroll system.