



Peralta  
Colleges  
Foundation  
*Your Future, Our Mission*

**SCHOLARSHIP  
FUND  
DEVELOPMENT PACKET**





333 E. 8<sup>th</sup> Street  
Oakland, CA 94606

[www.peraltafoundation.org](http://www.peraltafoundation.org)  
(510) 587-7809

Dear Colleagues and Community Partners,

The Foundation supports academic excellence and success throughout the District by building partnerships in the region to raise funds for scholarships to committed students and financial support to the four colleges that comprise the district.

The Peralta Community College District is comprised of Berkeley City College, College of Alameda, Laney College, and Merritt College. Together they provide northern Alameda County a range of educational programs and life-long learning opportunities.

Enclosed in the **Establishing a Scholarship Packet** you will find the following three (3) forms:

- Considerations in Establishing a Scholarship
- New Scholarship Fund Application
- Scholarship Fund terms & Conditions

If you have any questions please contact Mashariki White, Development Manager at [mashariki.white@peralta.edu](mailto:mashariki.white@peralta.edu) or 510.587.7812.

Sincerely,

LaNiece Jones  
Executive Director  
Peralta Colleges Foundation

Updated October 23, 2019



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## CONSIDERATIONS IN ESTABLISHING A SCHOLARSHIP

### Overview

Charitable gifts to Peralta Community College District are accepted and administered by the Peralta Colleges Foundation (PCF), a non-profit corporation under the Internal Revenue section 501(c)(3) and an auxiliary of the Peralta Community College District. Our federal tax number is 23-7091547.

The Peralta Colleges Foundation requires \$2,500 to establish a named scholarship fund with specific criteria, otherwise the donations are deposited in a general scholarship fund administered by the Foundation. Donations can be made via a check, credit card, or through appreciated stocks and bonds.

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Among the points to consider in establishing scholarship fund are:

- ***Will this be an annual or one-time scholarship or an endowment?*** A named annual scholarship will require a minimum annual donation of \$2,500 to keep the fund open. An endowment fund uses the interest generated by the investment to provide a scholarship, and it can take several years for a fund to generate enough interest.
- ***Purpose of scholarship*** - Major specific? College specific? Books only?
- ***Background*** - Many of our scholarship funds provide a description of the person for whom the fund is named to help the applicants understand how special this person was. For example: The ABC Fund is established in honor of ABC, who as a single working parent raised four children and believed in the power of education, instilling a strong work ethic and sense of personal responsibility in each child, all of whom attended or graduated from college.
- ***Amount of the Award*** – How much do you want the scholarship to be? How often would you like to distribute? Once a year? Twice a year? Spring or Winter Semesters?
- ***Criteria*** – This can be very specific or very general, as long as the criteria does not discriminate race, gender, sex, age, etc. You must decide if you want the student to demonstrate financial need *or* the recipient is simply recognized for academic or leadership achievement. Here is an **example** of scholarship criteria for **nursing**:
  - Be accepted into *and* officially registered in the Associate Degree Program in Nursing (RN) program at Merritt College at the time of application
  - An Oakland resident (proof of residency required)
  - Demonstrate financial need by having completed the Free Application for Financial Aid (FAFSA)
  - Maintain a 3.0 each semester for continued support
  - Must be a full-time student (12 units)

- Submit a brief essay (maximum two page, typed, double-spaced) describing why the applicant wishes to pursue a career in nursing.
- *Selection of Recipient*– The IRS discourages donors selecting the recipient of a scholarship funded by that donor, and it also jeopardizes the Foundation’s nonprofit status. Typically, a committee of faculty and staff/administrators reviews applications and selects a recipient(s) based on the scholarship criteria established by the donor. Donors are usually provided with the names of the scholarship recipient(s) and sometimes the GPA, the amount of the award, and when the scholarship award was disbursed. We encourage students to write thank you notes to the donor care of the Foundation, and then we forward the notes to the donor.

Peralta Colleges Foundation complies with California’s Proposition 209, which prohibits restricting scholarships on the basis of race, sex, color, ethnicity, or national origin. We treat all candidates for scholarships with dignity and respect, and therefore encourage our donors to provide equal opportunity to all persons without regard to color, race, religion, sex, national origin, citizenship, age, disability, marital status, pregnancy, sexual orientation, military status or any other category protected by law.

- *Scholarship Administration* –Peralta Colleges Foundation assists in stewarding funds for a variety of charitable and programmatic purposes throughout the district, and currently manages dozens of scholarship funds and college and program accounts. This includes acknowledgement letters, donor receipts, fiscal sponsorship for grants, issuing checks, contacting students, providing account updates and preparing or forwarding paperwork as required.

*Effective April 1, 2011, the Peralta Colleges Foundation began assessing a five percent (5%) gift fee on all donations and will reinvest that five percent into the operations of the PCF. This fee will be assessed as soon as the gift is accepted and deposited into the bank.*



## **Scholarship Fund Terms & Conditions**

This agreement summarizes the mutual understanding of the donor named below and the Peralta Colleges Foundation regarding the grant described in this agreement. This agreement will become part of the Foundation's records and will serve as a guide to those who administer the funds for the time period outlined below. Peralta Colleges Foundation is a 501(c) (3) auxiliary to the Peralta Community College District, federal tax ID 23-7091547

**GIFT ADMINISTRATION:** The funds received will be managed by the Foundation in accordance with the Foundation's policies and procedures. The funds may be combined with the Foundation's other assets for investment purposes. A one-time gift fee (5%) will be deducted from each contribution made by the Donor under this agreement.

- The donor will receive an annual report describing the scholarship recipients, the students' GPA, the amount of each semester's award, and when the scholarship awards were disbursed.

**FUTURE CONSIDERATIONS:** This grant will be funded with a one-time gift from the donor. The Peralta Colleges Foundation is grateful for the donor's and intends to fulfill the donor's objectives as reflected in this agreement. Should circumstances somehow prevent this grant from being used as described above Peralta Colleges Foundation will consult with the donor to ensure the funds are used in a way most consistent with the donor's intent. The Peralta Colleges Foundation will also be notified of any such changes so it may update its files.

**RECOGNITION:** Peralta Colleges Foundation may publish the name of the donor in various publications, on its website, and/or its social media sites unless otherwise instructed by the donor.

**Applicants shall apply for this scholarship by completing the online application found on the Peralta Colleges Foundation website, [www.peraltafoundation.org](http://www.peraltafoundation.org).**

**BINDING OBLIGATION:** *I understand that donations to the Peralta Colleges Foundation are irrevocable and will not be returned to the donor for any reason. Unless otherwise specified in writing, any unused funds will remain in the donor's account for use in subsequent awards.*

*Peralta Colleges Foundation treats all candidates for scholarships with dignity and respect and encourages our donors to do the same by providing equal opportunity to all persons without regard to color, race, religion, sex, national origin, citizenship, age, disability, marital status, pregnancy, sexual orientation, military status or any other category protected by law. This also adheres to Proposition 209, which prevents the Foundation, as an auxiliary of a public educational institution, from restricting scholarships on the basis of race, sex, color, ethnicity or national origin.*

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*All charitable gifts to the four colleges of the Peralta Community College District and its auxiliaries are accepted and administered by the Peralta Colleges Foundation, a non-profit corporation under the Internal Revenue section 501(c)(3) and an auxiliary of the Peralta Community College District. Our federal tax number is 23-7091547.*



## Scholarship Fund Application

Scholarship name: \_\_\_\_\_ Date: \_\_\_\_\_

Opening deposit (minimum \$2500 required to establish a scholarship fund): \$ \_\_\_\_\_

Location:  College of Alameda  Berkeley City College  Laney College  Merritt College  District Wide

Date established: \_\_\_\_\_

Primary contact: \_\_\_\_\_ Secondary Contact: \_\_\_\_\_

Phone # (day & evening): \_\_\_\_\_ Email: \_\_\_\_\_

Address (city, state, zip): \_\_\_\_\_

**Background information around the creation of the scholarship:**  One time Scholarship  Annual Scholarship

**Frequency & amount of award(s):**  Spring \$ \_\_\_\_\_  Fall \$ \_\_\_\_\_

**Purpose of Scholarship** (Describe your reason/intent for establishing the scholarship):

**Criteria for Award** (Major, GPA, Financial need):

**Non-academic criteria** (e.g., extracurricular activities, leadership, career or professional goals):

**How scholarship awards will be determined:**

- Please create a committee to review applications and present recommendations/finalists to me
- Please create a committee to review applications and select recipients for me
- I will form my own committee and submit award recipient's names to the Foundation

Your signature below acknowledges that you understand that Peralta Colleges Foundation (PCF) will assess a five percent (5%) administrative fee on all donations. This fee will be assessed upon receipt of the funds at the time of deposit. Donations to the Peralta Colleges Foundation for scholarship funds are non-refundable. Unused scholarship funds may remain in a scholarship fund and be used for future awards.

REQUESTED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

PCF Executive Director