SCHOLARSHIP FUND DEVELOPMENT PACKET

A guide and agreement for establishing a current-use scholarship

Thank you for investing in Peralta students.
This packet will help you define the purpose, funding, award structure, and eligibility criteria for a scholarship. The completed agreement becomes the guide the Foundation uses to administer the fund.

HOW THE PROCESS WORKS

1	2	3	4
Define	**Fund**	**Review**	**Award**
Choose the scholarship purpose, college scope, award amount, timing, and student criteria.	Select a one-time or annual funding schedule and submit the contribution to the Foundation.	The Foundation reviews the criteria for legal compliance and administrative feasibility.	The Foundation administers applications, recipient selection, and award disbursement.

DECISIONS TO MAKE BEFORE COMPLETING THE AGREEMENT

- ☐ One-time or annual funding, including the number of years for an annual commitment
- ☐ Scholarship name and the story, person, program, or purpose it honors
- ☐ Eligible college(s), academic major, enrollment status, GPA, and financial-need preference
- ☐ Number of students, award amount per student, award timing, permitted uses, and renewability
- ☐ Any essay, community-service, leadership, campus-involvement, or other selection guidance

KEY FOUNDATION POLICIES

Selection	Donors help define lawful criteria, but recipients are selected through the Foundation-administered process; donors do not control recipient selection.
Sustainability fee	A one-time 5% sustainability fee is assessed on restricted donations to support ongoing administration and student services.
Accepted gifts	Contributions are irrevocable and nonrefundable once accepted. Unused balances remain available for future awards consistent with the fund's purpose.
Changes	If the original award or criteria cannot be fulfilled, the Foundation will, when reasonably possible, consult the donor and preserve the original charitable intent as closely as practicable.

CONTACT

Tammeil Gilkerson, Chancellor | tgilkerson@peralta.edu
Peralta Colleges Foundation | 333 East 8th Street, Oakland, CA 94606 | Federal Tax ID 23-7091547

SCHOLARSHIP AGREEMENT

About this scholarship fund

A scholarship fund provides current-use financial support for Peralta students. A signed agreement and funding sufficient to support the awards described below are required. The Foundation will hold the contributions as restricted funds and administer scholarship awards in accordance with this agreement and Foundation policies. Award amounts and timing depend on available funds and the Foundation's scholarship process.

1 DONOR AND FUND INFORMATION

Donor name(s)	_____
Organization, if applicable	_____
Mailing address	_____
Email	_____
Phone	_____
Scholarship fund name	_____
Gift or pledge amount	$_____ Date: _____
Funding schedule	☐ One-time gift ☐ Annual gift for _____ year(s) ☐ Other: _____
Award timing	☐ Fall ☐ Spring ☐ Annual cycle ☐ Other: _____
Donor recognition	☐ Foundation may recognize donor/fund publicly ☐ Please keep anonymous

2 SCHOLARSHIP PURPOSE AND SCOPE

Please answer the questions below to identify the eligibility criteria students must meet to be considered for this scholarship. In accordance with applicable nondiscrimination laws, scholarship criteria may not discriminate based on race, color, national origin, sex, or any other legally protected characteristic. Skip any question that does not apply.

☐ Districtwide: eligible students attending any Peralta college
☐ Designated college(s): _____
☐ Other approved scope: _____

Purpose or legacy statement (optional):

3 SCHOLARSHIP CRITERIA

Academic major required	_____
Student status (check all that apply)	☐ Incoming first-year student ☐ Continuing student ☐ Transfer student
Enrollment status (check one)	☐ Full-time (12+ units) ☐ Half-time (6–11 units) ☐ Less than half-time (fewer than 6 units)

Educational status (check all that apply)	☐ First-generation college student (first in their family to attend college) ☐ Re-entry student (did not attend college directly after high school)
Minimum GPA required	_____
Financial need (check one)	☐ Not considered ☐ Required ☐ Preferred
Campus involvement (check one)	☐ Not considered ☐ Required ☐ Preferred Examples: student clubs, athletics, or student government
Community service (check one)	☐ Not considered ☐ Required ☐ Preferred Examples: volunteer service, community organizing, or civic engagement
Students awarded annually	_____ student(s) each year
Award amount per student	$_____ per student, per year
Award use	☐ Tuition/fees ☐ Books/supplies ☐ Other approved educational costs
Renewability	☐ One-time ☐ Renewable, subject to: _____

4 ADDITIONAL SELECTION GUIDANCE

Optional preferences, essay prompt, service expectations, or other relevant guidance:

Scholarship criteria review

The Foundation will review the proposed criteria before accepting this agreement. Criteria must comply with applicable requirements and be practical for the Foundation to administer. Any requested revision will be discussed with the donor before the agreement is finalized

5 ADMINISTRATION AND ANNUAL SCHOLARSHIP CYCLE

- The Foundation will administer applications, select recipients, disburse awards, and may provide stewardship information as permitted by law and policy. Donors may define scholarship criteria but will not control recipient selection.
- The number of recipients and award amount per student identified in Section 3 are subject to the restricted funds available for scholarship awards each year.
- A one-time 5% sustainability fee will be assessed on all restricted donations. This fee supports the Foundation's ongoing administration and its ability to serve Peralta students.
- Contributions are irrevocable and nonrefundable once accepted. Unless otherwise agreed in writing, unused balances will remain available for future awards consistent with the scholarship's purpose.
- If the scholarship criteria become unlawful, impracticable, or impossible to fulfill, or available funds are insufficient to make the stated award, the Foundation will, when reasonably possible, consult the donor or donor representative and adjust the award or criteria in a manner that most closely preserves the donor's original charitable intent.

6 DONOR CERTIFICATION AND AUTHORIZATION

I/We confirm that this agreement reflects our charitable intent and authorize the Peralta Colleges Foundation to administer this scholarship fund according to the terms above and the Foundation's established scholarship procedures.

Donor signature	_____	Date: _____
Donor signature	_____	Date: _____
Foundation acceptance	_____	Date: _____
Name / title	_____	

7 GIFT DELIVERY AND FOUNDATION CONFIRMATION

Peralta Colleges Foundation
Mailing Address: 333 East 8th Street, Oakland, CA 94606 | Federal Tax ID 23-7091547
Foundation Contact: Tammeil Gilkerson, Chancellor | tgilkerson@peralta.edu