1. Policy Statement

1.1. Scholarship management processes are determined by each Awarding Unit of the university. Awarding Units design and implement the most effective method of administering scholarships to ensure full compliance with the university’s obligations around the administration of federal financial aid funds and compliance with federal and state laws, university policy, scholarship administration best practices, and scholarship gift agreements.

1.2. When questions or concerns arise regarding an Awarding Unit’s scholarship administration rules or processes, those questions or concerns will be resolved in accordance with Section 5.2 of this policy.

1.3. Noncompliance with this policy or failure to cooperate in complying with its provisions may result in suspension or loss of scholarship administration privileges or other university sanctions or disciplinary action.

2. Reason for Policy

2.1. This policy supports consistent and equitable notice, awarding, and management of scholarships across the university, and provides a path for dispute resolution related to scholarship administration.

2.2. The university’s current scholarship management processes are intentionally decentralized to allow Awarding Units flexibility to design and implement scholarship awarding practices that are appropriate for their specific disciplines and student populations. Responsibility for designing and implementing scholarship processes resides with the Awarding Units under the oversight of their respective deans or similar unit leaders.

2.3. Scholarship awarding practices must align with scholarship administration best practices, university policy, scholarship gift agreements, and federal and state laws, including requirements of federal financial aid programs, which require that all sources of funding be taken into account in determining federal financial aid eligibility.
3. **Scope & Audience**

3.1. This policy applies to employees who award university scholarships to university students.

3.2. Awards wholly controlled and administered by individuals or organizations outside of the university are not subject to this policy.

4. **Definitions**

4.1. **Awarding unit.** A college, department, program, or organization that administers a scholarship.

4.2. **Scholarship.** Funds fully controlled and administered by the university awarded to students with the intent to support the educational expenses of the recipients. Scholarships include funds awarded for tuition, fees, housing, meals, travel related to educational opportunities, books and other educational and personal expenses. An item or transfer (monetary or otherwise) given by the university to a student as a prize, an award, an honorarium, to support participation in co-curricular or experiential activities, or in recognition of success in an organized competition will be treated as a scholarship.

4.3. **Scholarship administration program.** The training, system software, guidelines and other scholarship administration requirements as determined by the Scholarship Office.

4.4. **Scholarship gift agreement.** Legally binding documentation executed by the university, the OSU Foundation, or the scholarship donor that describes how the scholarship funds will be administered. This documentation may include, but is not limited to, donor gift agreements and amendments, memoranda of understanding, estate documents, and court orders.

5. **Responsibilities & Procedures**

5.1. **Scholarship Program Oversight**

5.1.1. The Scholarship Office serves all recipients of university scholarships, works to increase opportunities for access, provides financial guidance to students and families, and encourages engagement and research throughout our state, our nation, and our world. The Scholarship Office also:

   a. Provides scholarship support resources for employees.

   b. Acts as a clearinghouse for scholarship opportunities.
c. Selects the university’s scholarship management system and develops its Scholarship Administration Program.

5.1.2. The deans and similar unit leaders are responsible for overall oversight of scholarship awarding within their respective administering units and are accountable for ensuring that the administering units enact scholarship administration rules and processes that manage scholarship awards in compliance with federal and state laws, university policy, scholarship administration best practices, and the appropriate scholarship gift agreements.

a. The dean or similar unit leader may choose to delegate intermediate responsibility for this oversight to an associate dean, assistant dean, department chair, or a similar unit member.

5.1.3. The scholarship administrators in the Awarding Units are responsible for the day-to-day operations related to their unit’s scholarships and are accountable for implementing the scholarship administration rules and processes for the associated Awarding Unit under the direction of the dean, similar unit leader, or their delegate.

5.2. Resolving Questions and Concerns about Scholarship Administration

5.2.1. University employees with questions or concerns regarding an Awarding Unit’s scholarship administration must first attempt in good faith to resolve the questions or concerns with the scholarship administrator in that unit. If a dispute arises or if the questions or concerns are not resolved at this level, any person involved in the matter may escalate the issue:

a. To the dean or their designee, or the similar leader in their unit, then

b. To the Scholarship Office for assistance with identifying the office responsible for creating, implementing, or interpreting the disputed policy or process, if it is not clear from the nature of the issue, then

c. To the office that is responsible for creating, implementing, or interpreting the disputed policy or process, then

d. To the provost, who has final decision-making authority.

5.3. Scholarship Administration Program

5.3.1. Each Awarding Unit is encouraged to utilize the Scholarship Administration Program as designated by the Scholarship Office. If an Awarding Unit chooses to administer some or all of its scholarships outside of the designated
Scholarship Administration Program, it is responsible for creating and implementing comparable processes to effectively award its scholarships in compliance with federal and state laws, university policy, scholarship administration best practices, and scholarship gift agreements.

6. Forms & Tools

6.1. The Scholarship Office maintains a webpage that provides information about best practices, guidance, and resources for university and OSU Foundation employees who are involved in the creation, administration, awarding, and stewardship of scholarship and student support funds. University and OSU Foundation employees with valid ONID credentials may access this webpage by visiting the “Faculty & Staff” link available on the Scholarship Office’s main page at https://scholarships.oregonstate.edu/.

7. Frequently Asked Questions

7.1. None.

8. Related Information

8.1. None.

9. History

9.1. Adopted by OSU: University Policy 03-400 Scholarship Administration was adopted by Oregon State University on October 31, 2023.

9.2. Next scheduled review date: October 2026.

10. Website

10.1. https://policy.oregonstate.edu/policy/scholarship-administration

11. Contact Information

Scholarship Office
(541) 737-1125
https://scholarships.oregonstate.edu