

CSU San Marcos University

Stateside Scholarship Application & Approval Procedures

Financial aid using stateside funds will be awarded and disbursed in compliance with University policy and procedures outlined in this document and subject to statutory, regulatory, and policy limitations, in accordance with applicable guidelines described in CSU coded memorandum ASA-2016-10.

The request for a scholarship using stateside funds should be vetted with senior leadership (with signature authority) to ensure that it is a viable program, strategic, and in alignment with department, division, and University goals. Each department awarding these scholarships must develop a procedure document that should be reviewed each year and updated with any changes in process.

Departments applying for this process will complete the attached application and route for required approvals/signatures.

Application Process

The application process must be transparent, consistent, and include unbiased written details on applying, selection criteria, award restrictions, and disbursement for each scholarship award that facilitates a fair and open process. The documented procedures related to the applications and administration of the scholarship funds will include:

- Clear method(s) for students to apply for scholarships, including when, how, and where each scholarship will be advertised to students.
- Advertisements of scholarship opportunities should be in an accessible public format with eligibility criteria detailed and deadlines clearly displayed. These may include both public and targeted communications.
- Scholarship application details, restrictions, and related deadlines that are clearly defined and published.
- Awarding criteria and a process for documenting award decisions.
- The CSUSM General Scholarship Committee will be used to select students.

Scholarship application criteria should not include race, gender, color, ethnicity or national origin, religion or sexual orientation (Cal. Const., art. I, § 31).

Financial need must be demonstrated, and the campus will use federal need analysis established in the Free Application for Federal Student Aid (FAFSA) or the California Dream Act Application (CADA).

Scholarship Committee

The objective of the scholarship committee is to identify eligible recipients and, from a pool of applicants, select the best candidate(s) for the scholarship. The scholarship committee is administered by Financial Aid and is comprised of Faculty, Staff, and Administrators from the campus. Annually, there are approximately 30 volunteers. The committee memberships are reviewed yearly to document any changes in membership.

Fund Management

It is the responsibility of the Administrator in each participating department to monitor the funds that have been awarded and disbursed. They must not disburse more than what has been allocated. This includes any amounts disbursed or cancelled but not returned. Budgeted funds not spent or overspent in the current year may roll over to the next year depending on divisional guidelines.

Funds Allowed to Apply for a Scholarship Using Stateside Funds

Departments must keep all documents related to the scholarship program for three (3) years from the end of the award year. These documents include applications, award information, and methodology in how the decisions were made. General Fund appropriations or state university fee revenue may not be used to pay for summer athletics scholarships. EDC §89241(i)

Please note that any campus fund not listed within the matrix indicates scholarship requests are not allowed.

Fund Code	Description	Allowable
441XX	Extended Learning and Extended Learning Campus Partners (only non-refundable grants are allowed)	Yes
463XX	Instructionally Related Funds – Student Fee Funded	No
463XX	Instructionally Related Funds – Non-Student Fee Funded	Yes
481XX	Lottery Funds	Yes ¹
485XX	Operating Funds	No ²
496XX	Miscellaneous Trust - as allowable per trust fund agreement	Yes

¹Requirement: Lottery funds may be used for scholarships on a limited basis and scholarships funded by lottery monies must specifically be for instructional purposes. Scholarship funding may also be issued from the CO through special allocations for lottery scholarships. Further information pertaining to campus-based programs is located on the Systemwide Budget Office website, [Lottery](#).

²Financial aid mandated through statutory requirements are permitted, e.g., SUG, EOP, Graduate Professional Fee, or designated funds such as mandated allocations from the state, grants, etc. specifically designated for financial aid are allowed. Proof of allowability (e.g., Interagency Fund Transfer, Allocation order, or Grant from CO) must clearly demonstrate the allowability of financial aid within the funding and be included with the memo request.

Approval Process, Routing, and Account Codes

After developing criteria and funding source, email draft and work with Financial Aid to ensure the scholarship criteria are appropriate by emailing scholarships@csusm.edu.

Financial Aid will assess the request and confirm that the criteria provided in the scholarship criteria memorandum meet CSUSM Guidelines. After receiving confirmation from Financial Aid, you may move forward with approvals in Adobe Sign.

The Vice President of FAS has delegation from the President to approve the use of campus funding for financial aid and must be included in the approval process. Reference: EDC §89721(b) President (or designee(s))- EDC §89756; STANDING ORDERS OF THE BOARD OF TRUSTEES OF THE CALIFORNIA STATE UNIVERSITY §VI(d), (e)

Approval Matrix and Financial Aid Account Code by Fund

Fund Code/Description	Acct Code/Description	Routing for Approving
<p>441XX</p> <p>Extended Learning and Extended Learning Campus Partners</p>	<p>609814</p> <p>Financial Aid EL Scholarship</p>	<p>Requestor Fiscal Authority Reviewer for College Dean College Dean Reviewer for EL Dean EL Dean Provost (provost@csusm.edu) CFO Financial Aid (scholarships@csusm.edu)</p>
<p>463XX</p> <p>Instructionally Related Funds – Non-Student Fee Funded</p>	<p>609008</p> <p>Financial Aid Student Scholarships</p>	<p>Requestor Fiscal Authority Reviewer for College Dean or AVP College Dean or AVP Reviewer for Provost or VP Provost (provost@csusm.edu) or VP Reviewer for CFO CFO Financial Aid (scholarships@csusm.edu)</p>
<p>481XX</p> <p>Lottery Funds</p>	<p>609008</p> <p>Financial Aid Student Scholarships</p>	<p>Routing is the same as routing for Fund Code 463XX.</p>
<p>485XX</p> <p>Operating Funds - Mandated allocations from the state, grants, etc. specifically for financial aid</p>	<p>609008</p> <p>Financial Aid Student Scholarships</p>	<p>Routing is the same as routing for Fund Code 463XX.</p>
<p>496XX</p> <p>Miscellaneous Trust - as allowable per trust fund agreement</p>	<p>609005</p> <p>Other Student Scholarships/Grants</p>	<p>Routing is the same as routing for Fund Code 463XX.</p>

Record Retention

Departments must keep all approved memos related to the scholarship program for three (3) years from the end of the award year. These documents include award information and confirmations from Financial Aid.

References

[ICSUAM Section 2003.00 Use of State Funds for Financial Aid](#)
[ASA-2016-10 Scholarship Administrative Guide](#)

Contacts

Financial Aid: scholarships@csusm.edu
 Controller: Diana Cumming dcumming@csusm.edu

Example of Memorandum

MEMORANDUM

DATE:

TO: Leon L. Wyden Jr.
Vice President, Finance and Administrative Services/Chief Financial Officer

FROM: Vice President/Vice Provost or Provost

SUBJECT: Request for Approval of XYZ Scholarship Using Funding from Fund XXXXX – Fund Name

Scholarship Name:

Proposed semester scholarship will begin:

Estimated amount to be disbursed per year:

Grant or Scholarship amount or range per student:

Number of awards per year:

Grant or Scholarship end date (or ongoing):

Funding Source (Chartfield string Fund/Dept/Account):

Group this will serve:

Describe the impact to the campus or program of providing this financial support:

Please check career selection below:

Undergraduate Graduate Credential

Please check the box acknowledging that the grant or scholarship is in alignment with EL and Campus Scholarship Guidelines and understand that EL Financial Aid Grants are non-refundable.