

NORTH CAROLINA  
COMMUNITY FOUNDATION



# North Carolina Community Foundation

Scholarship Administrator Training  
Feb. 14, 2024

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## **Our Mission:**

**To inspire North Carolinians to make lasting and meaningful contributions to their communities.**

# Snapshot of NCCF

- Founded in 1988 with the vision of providing rural NC with the same philanthropic services as larger communities
- Serve the entire state, with a focus on rural NC

**1,200+**  
charitable  
funds

**\$270M**  
in grants and  
scholarships

**\$400M**  
charitable assets  
held and managed  
by NCCF

# Scholarships

- Partner with fundholders to administer hundreds of scholarship opportunities across North Carolina.
- We manage 150 scholarship funds for individuals, families, school systems and organizations.
- Scholarship opportunities are provided from specific funds with criteria established by the original donor.

# NCCF Scholarship Awards

In 2023, NCCF awarded nearly \$1.3 million in scholarship aid to 309 students from across the state.

95 first-  
generation  
scholars

From 131 NC  
cities and  
towns

\$1.1M of the  
dollars went  
to NC schools

Scholars study at  
68 schools in 15  
states

Scholars study at  
14 community  
colleges across  
NC

# Your Role as a Scholarship Administrator

- Understand NCCF's policies and procedures
- Uphold the specific criteria of the scholarship you administer
- Promote the scholarship to applicable institutions
- Support NCCF's due diligence process by following rules and regulations
- Schedule, manage and track committee meetings
- Ensure deadlines are met
- Operate a fair and equitable process for awarding scholarships

# Pension Protection Act (PPA)

- PPA of 2006 established strict guidelines regarding scholarship awards from community foundations
- NCCF must appoint all members of the scholarship committee by name on an annual basis before scholarship process may begin
- Scholarships must be awarded on an objective, non-discriminatory basis using procedures approved in advance by the foundation's Board of Directors
  - Grantee/applicant pool shall be large enough to encompass a charitable class
  - Selection criteria that does not unfairly limit the applicant pool
  - Those who select recipients shall not be in a position to derive a private benefit, directly or indirectly, from the selection process

# PPA – Donor Control

- Donor control is prohibited
  - Neither the donor nor any related party may control the committee directly or indirectly
  - Votes of “objectively qualified individuals” on the committee (e.g. teachers, community members) must outnumber those of donors or donor-related parties
  - Donors must not unduly influence scholarship proceedings directly or indirectly
  - If a donor is on the committee, their advice is given solely as a member of the committee



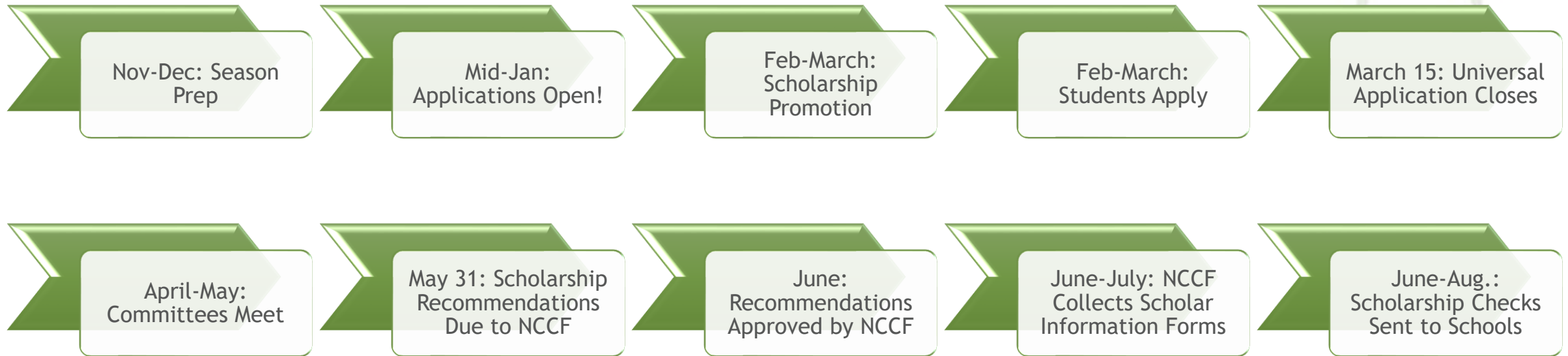
# How Does Each Scholarship Function?

- The donor's fund agreement with NCCF sets the parameters for the scholarship:
  - Fund name
  - Eligibility criteria
  - Renewability
  - Scholarship coverage (tuition, room/board, etc.)
  - Scholarship selection committee structure
- Scholarships are endowed: Permanent funds are invested to preserve the donor's gifts and provide dependable dollars annually to award
  - NCCF calculates amount available to award annually and shares with scholarship administrator
- NCCF is the "holder" of the scholarship funds, and is required to follow certain federal rules about scholarships

# Universal Application

- NEW! Launched for the 2024 season
  - 130 scholarships
  - 20 additional scholarships operate outside the UA
- Easier and more efficient experience for students, counselors and references
- Online application lets students apply for multiple NCCF scholarships using a single application
  - Students respond to a set of general questions (e.g., county of residence, GPA, intended field of study) and applicants are matched with scholarships they may qualify for.
  - Then can answer additional questions or provide other information to respond to a specific scholarship
- Applications will be more closely aligned with each scholarship's specific criteria, resulting in fewer non-eligible applications


# Scholarship Season at a Glance



# Declaration Form

- A key component of planning for and running the scholarship award process
- Requires administrators to provide information on award season
- Due in November of each year

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**2024 Scholarship Declaration Form**

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**Scholarship Administrator Contact Information**

Administrator:  
Email Address:  
Phone:

Will you serve as Scholarship Administrator for the 2024 scholarship season? ☐ Yes ☐ No

If you will **not** be serving as Scholarship Administrator and know who your successor will be, please provide their name and email address: \_\_\_\_\_

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**Scholarship Criteria**

*To comply with federal law, NCCF must approve all scholarship criteria and procedures as objective and non-discriminatory. The criteria below have been approved as written and cannot be changed without legal action. Below are the eligibility criteria for the scholarship you administer:*

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**Declaration of the Scholarship Award in 2024**

Will you award a scholarship in 2024? ☐ Yes ☐ No  
*If no, skip the remaining questions and sign and return this form.*

Will you award: ☐ New scholarships ☐ New scholarships and renewals ☐ Renewals only

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**Attestation**

I have reviewed the information above and certify that it is complete and accurate to the best of my knowledge. I understand that scholarship eligibility criteria and the Scholarship Administrator's name, email address, title and organization will be available on the NCCF website and I will notify NCCF of any changes.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

Please return to NCCF by Nov. 22, 2023 via email: [scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org).  
Questions? Email [scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org) or call 919-828-4387.

# Committee Form

- A key component of complying with the Pension Protection Act
- Scholarship Administrators use this form to seat selection committees in accordance with the scholarship's fund agreement
- *Forms are due by Feb. 15*

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## 2024 Scholarship Committee Form

### Scholarship Administrator Contact Information

Administrator:  
Email Address:  
Phone:

### Scholarship Selection Committee

To comply with federal law, NCCF must ensure the Scholarship Selection Committee is not donor-controlled (i.e., non-donor-related individuals must outnumber donor-related individuals). While the position slots noted below cannot change without legal action, it is allowable for individuals occupying those slots to change from year to year, as long as donor-related individuals do not comprise a majority.

Please note which individual will be occupying each Committee Position for the 2024 season. Rows where no Committee Position is noted should be left blank.

Committee Position: Name:	Title:
Committee Position: Name:	Title:
Committee Position: Name:	Title:
Committee Position: Name:	Title:
Committee Position: Name:	Title:
Committee Position: Name:	Title:
Committee Position: Name:	Title:

### Attestation


I have reviewed the information above and certify that it is complete and accurate to the best of my knowledge. I further attest that the Scholarship Selection Committee listed above is populated by a majority of individuals who are not donor-related.

Signature of Scholarship Administrator      Name of Scholarship Administrator      Date

Please return to NCCF by Feb. 15, 2024 via email: [scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org)  
Questions? Email [scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org) or call 919-828-4387.

# The NCCF Application Portal

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Scholarships

Logon Page

Email Address\*

sbowick@nccommunityfoundation.org

Password\*

.....

Log On

Create New Account

Forgot your Password?

**Welcome to NCCF's online scholarship system!**

All NCCF scholarships are now available in our online system. Please be sure to follow the instructions for how to apply to each scholarship on the NCCF website. Please carefully review scholarship information to find eligibility criteria, application due dates and access codes to submit an application.

If you are not sure and would like to take another look, please click [here](#) to revisit our scholarship search page, enter your home county and review the scholarship information.

**First time here?**  
Click "Create New Account". If you need assistance, please refer to the [Module 1](#) training materials. Be sure to keep this login information handy!

*TIP: This email address is the one we will use to communicate with you if we have questions, which sometimes require immediate response. Be sure to use an email address that you check regularly.*

**Been here before?**  
If you have already used our online scholarship system, but have forgotten your password, please click "Forgot Your Password?" and follow the instructions.

If you have applied to one of NCCF's scholarships before, but not using this new system, please refer to the "First time here?" instructions above.

# Scholarship Evaluation Portal



Shared Documents

Fax to File

## Dashboard

### INSTRUCTIONS

Thank you for evaluating scholarship applications! To read the applications, please follow these instructions.


1. In the list below, click the **Project Name** in blue to the right of each applicant's **Last Name** of the application you want to read.
2. The next page is the **Request Summary**. To access the application, click **View Application**
3. On the subsequent page, you will see the application you just selected. You may scroll down to view the application content, **or** you may click **Application Packet** to view and/or print a .pdf file of the complete application including supplemental documents such as transcripts and letters of recommendation.
4. When you are ready to move to the next application, click the home button (house icon at the top of the page) to return to your dashboard.
5. Follow steps 1, 2 and 3 to access each application.
6. Complete the scoring rubric provided by your scholarship's administrator.

Your Evaluations 0

Your Follow Ups 0

There are no Evaluations assigned to you at this time.

# Accessing Applications



REQUESTS & DECISIONS

SHARED DOCUMENTS

ROLE (REGIONAL STAFF) ▼

Dashboard

PROCESS 0

INSTRUCTIONS

Thank you for your time evaluating scholarships! You can review detailed instructions and tips on evaluating in the Shared Documents menu above. *Please ignore the Your Follow Ups tab.\**

To read the applications, please follow these instructions.

1. In the list below, click the red exclamation point to the far right of the application you want to read.
2. On the subsequent page, click the Application tab to read the application. You may also click Application Packet to create a pdf of the application and any additional documents that may have been uploaded by the applicant.
3. When you are ready to move to the next application, click the home button (house icon at the top of page) to return to your dashboard.
4. Click the exclamation point of the next application you want to read.

\*This is visible because Internal Follow Ups is turned on.

Your Evaluations 1

Closed Evaluations 3



Your Follow Ups 0

Pending 1

Quick Search

Group by Student

FILTER 0

Form	Process	Applicant First Name	Applicant Last Name	Project	Score
 Evaluation	V. J. "Puck" & Pearl O'Neal Scholarship Fund	Margaret	Anderson	<a href="#">(View Request)</a>	<a href="#">Start</a> 

Previous 1 Next

Showing 1 - 1 of 1 50 ▼

This is your dashboard. Once on this page, click View Request in blue to access the application





# Viewing Applications


## Request Summary

[\(View Request\)](#)

Opportunity: V. J. "Puck" & Pearl O'Neal Scholarship Fund

[Return to Application Evaluation Assigned](#)[Contact Info](#)[Request](#)[\\$ Award Details](#)[Documents 0](#)[Comments 0](#)[Related Requests](#)

Current Status: Evaluations Assigned

Stage		Status	Initial Submission	Last Modified
	Application	Complete	10/10/2023	02/05/2024
	Evaluation 1	Open		

[Request History](#)[Submission History](#)[Request Change Log](#)

To review the application, click the PDF icon or the paper and pencil icon

# Options for Reviewing Applications

The screenshot shows the 'Application' page for the 'V. J. "Puck" & Pearl O'Neal Scholarship Fund'. The header includes the North Carolina Community Foundation Scholarships logo, navigation links for 'REQUESTS & DECISIONS' and 'SHARED DOCUMENTS', and a user role indicator 'ROLE (REGIONAL STAFF)'. The main content area has a title 'Application' with a '(View Request)' link and the opportunity name. Below this is a 'Return to Application Evaluation Assigned' link and a set of tabs: 'Contact Info', 'Request', 'Award Details', 'Documents' (with a count of 0), 'Comments' (with a count of 0), and 'Related Requests'. The 'Request' tab is active, showing applicant information: Margaret Anderson, MargaretAnderson@FExample.org. At the bottom, there are buttons for 'APPLICATION PACKET' and 'QUESTION LIST', and a list of application sections: 'Student and Academic Information' and 'Letter of Recommendation', both with expandable arrows. A note indicates that fields with an asterisk (\*) are required.

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Scholarships

REQUESTS & DECISIONS SHARED DOCUMENTS

ROLE (REGIONAL STAFF) ▼

Application  
(View Request)  
Opportunity: V. J. "Puck" & Pearl O'Neal Scholarship Fund

Return to Application Evaluation Assigned

Contact Info Request Award Details Documents 0 Comments 0 Related Requests

Applicant:  
Margaret Anderson  
MargaretAnderson@FExample.org

Application APPLICATION PACKET QUESTION LIST

Fields with an asterisk (\*) are required.

> Student and Academic Information

> Letter of Recommendation

You may scroll down to view the application content, or you may click Application Packet to view and/or print a PDF file of the complete application including supplemental documents such as transcripts and letters of recommendation.

# Tips for Reviewing Applications

- Review any preferences outlined in your criteria on deceleration form
- Extracurriculars indicate not only experience, but areas of interest and connection to academic/career goals
- Essay:
  - Should answer the question prompt, as well as how the applicant plans to further their interests and reach their goals
  - May also reveal how extracurricular activities or work experience have impacted their educational aspirations
- Letters of recommendation:
  - Do not let grammatical errors or oversights negatively impact the applicant
  - Consider if the letter provides context or specific examples about the applicant's character or leadership skills
- Consider financial need if applicable for your scholarship

# FAFSA

- Free Application for Student Aid (FAFSA) is the form students use to apply for federal student aid. The form collects information that is universally used by financial aid offices and scholarship providers to assess a student's financial need
- The Federal Student Aid Office revamped the FAFSA application in 2024 to improve the process and experience for students and expand eligibility for federal student aid
- The launch was delayed and is rolling out slowly, resulting in delayed information

# FAFSA: Student Aid Index (SAI)

- The Expected Family Contribution (EFC) has been replaced by a Student Aid Index (SAI) number
- SAI is an evaluation of a family's financial resources available to help pay for college and is to be used by financial aid offices use to determine how much aid students receive
- This number is **NOT** a dollar amount of aid eligibility or what a family is expected to provide
- A **lower SAI** indicates the student has a **higher financial need**
  - The SAI number has a minimum of negative 1500. The lower the score, the greater the financial need the student has.
  - Students with an SAI between zero and negative 1500 qualify for the maximum Pell Grant amount

# Considering Financial Need in 2024

- The delayed launch has resulted in **delayed SAIs** for most students
- NCCF updated our application requiring a Financial Statement from students.
  - “If you completed a FAFSA application and your SAI number has been delayed, please provide additional information below. Information may include total household income for 2023, how much your family expects to contribute to your education next year, number of individuals in household, number of individuals going to college next year, you or your family’s participation in Medicaid, SNAP, free and reduced lunch, WIC, low-income internet program, etc.”
- Applicants should **NOT** be penalized if they do not provide an SAI

# Scholarship Recommendation and Minutes Form

- These forms have been combined and streamlined
- Note award recipients, award amounts, and alternates
- Document committee members participating in the selection, record meeting details, note conflicts of interest and recusals
- Must be signed by the Scholarship Administrator
- Due by May 31
- Notify all applicants of the committee's decision, meaning both approvals and denials

A large, stylized teal graphic on the left side of the slide. It depicts a hand with fingers slightly curled, holding a heart shape. The entire graphic is rendered in a light teal color against a white background.

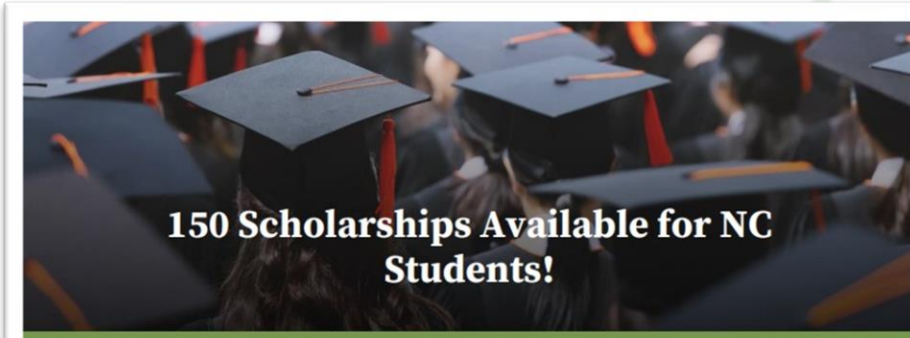
# **Marketing Your Scholarship**



# Promotional Materials to Support You

[nccommunityfoundation.org/scholarships](http://nccommunityfoundation.org/scholarships)

- All starts at on our website
- For students, administrators and recipients
- NEW! – Promotional toolkit for administrators
  - Templates for flyers, press releases, emails, texts and social media posts



Nearly 150 college scholarships from the North Carolina Community Foundation are now open for applications. Scholarships are available for students in every county, and it is easier than ever to apply for scholarships from NCCF.

Through the NCCF Scholarships Portal, students can:

- Use the new NCCF Universal Scholarships Application, which filters through 120 scholarships and determines which scholarships students are eligible for.
- Apply individually for additional scholarships.

#### HOW TO APPLY

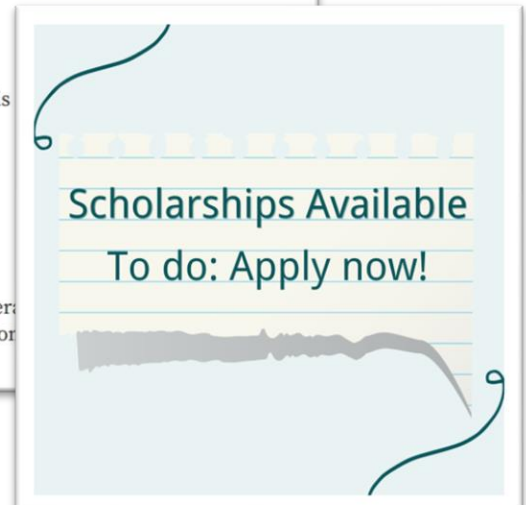
Visit [nccommunityfoundation.org/scholarships](http://nccommunityfoundation.org/scholarships) or scan this QR code.

#### DEADLINE

Most NCCF scholarships close on March 15.

#### QUESTIONS?

Email [scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org) for general scholarships. For questions about a specific scholarship, contact that scholarship's local contact.



# Scholarship Webpages

Scholarship pages include:

- Scholarship criteria
- Administrator contact information
- Application due date
- Link to NCCF's Scholarships Portal

## Robert E. Barnhill, Sr. Scholarship Fund

SHARE    

[Home](#) / [Scholarships](#) / [Robert E. Barnhill, Sr. Scholarship Fund](#)

### Criteria

[DONATE TO FUND >](#)

High-school graduate who is a North Carolina resident and is attending a college or university. Considered are leadership potential, community involvement, physical vigor, academic achievement and financial need. Special consideration is given to employees/relatives of employees of Barnhill Contracting Company. \*\*ESSAY PROMPT: Describe an experience that has had a significant impact on your life and then explain why you are applying for the Robert E. Barnhill, Sr. Scholarship.

### Local Contact

Ms. Debbie Pannell  
Barnhill Contracting Company  
[dpannell@barnhillcontracting.com](mailto:dpannell@barnhillcontracting.com)

### Due Date

March 15, 2024

### How to Apply

Apply for this scholarship using the [NCCF Scholarships Portal](#).

[MORE SCHOLARSHIPS >](#)

# Promoting Your Scholarship

- Share with area high schools and other appropriate institutions
- Customize and distribute the scholarship flyer that we provided
- Direct students to your scholarship's webpage on NCCF's website
- Use the toolkit materials
- Think about what other approaches may work in your community
- Promote your scholarship after it's been awarded



# Need Help?

- Have a question?
- Need advice?
- Need a Scholarships Portal tutorial?

Don't hesitate to reach out!

NCCF Scholarships Team

[scholarships@nccommunityfoundation.org](mailto:scholarships@nccommunityfoundation.org)

919-828-4387

**Thank you for helping us make students'  
dreams a reality!**

*State of Generosity™*

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