



SCHOLARSHIP PROGRAM POLICY

The California Transportation Foundation's (CTF) Scholarship Fund program was established to support interest in transportation related fields and efforts to increase the pool of qualified talent for transportation organizations in California. Through its Scholarship Program, CTF encourages the creation of transportation-related scholarships that assist students who want to work in the transportation industry or are children of transportation employees killed on the job. Those eligible for scholarships are, with a few exceptions, students in undergraduate, graduate or trade school programs that apply to employment in transportation. Students must be U.S. citizens, permanent residents or documented international students and living in California at the time of that application. CTF retains the right to approve or reject all scholarship establishment applications.

CTF supports three categories of scholarship programs:

(1) Endowed Scholarships, (2) Partnered Scholarships, and (3) Foundation Scholarships. On an annual basis, each Scholarship program is evaluated to determine whether it meets the Scholarship Program Standards. The minimum scholarship grant is \$750.

General Scholarship Standards

CTF, including CTF Scholarship Coordinators, do not and shall not discriminate based on race, color, religion (creed), gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status in any of its activities or operations.

All CTF Scholarship programs must:

1. Adhere to an open, competitive selection process, which, at a minimum, requires:
 - a. That no member of the selection committee be the parent, grandparent, child sibling, aunt, uncle, or other lineal descendant or antecedent (either biological or adoptive) of any current scholarship applicant; and
 - b. That no member of the selection committee be a person under the economic control of a parent, grandparent, child sibling, aunt, uncle, or other lineal descendant or antecedent (either biological or adoptive) of any current scholarship applicant. An individual is under the economic control of a person if that person is such individual's direct or indirect superior or if there is otherwise a significant economic relationship, either employment related or not.

*CTF has grandfathered-in two long-standing scholarships coordinated by Caltrans employees that do not have the transportation major requirement, neither does the Children of Fallen Workers scholarship.

2. Be administered as described in an approved program establishment request form which contains the following information:

a. Scholarship Name.

b. Contact Person/Program Coordinator. The name, address, phone number and e-mail address of the designated contact person.

c. Awards. A statement setting forth the number and value of the scholarship awards. If actual data are not available, the statement should indicate that it is a best estimate. The statement must indicate whether the scholarship is an annual scholarship or a one-time grant.

d. Eligibility Criteria. A statement setting forth the scholarship eligibility criteria. The eligibility criteria must include the school or professional designation of qualified recipients (i.e. high school seniors, organization interns, etc.), the discipline being supported and the academic standards that are a prerequisite to scholarship consideration.

e. Selection Process. A statement describing who will select the scholarship recipients and how they will do so. The statement should set forth the criteria that will be considered and the relative weight given to such criteria.

f. Presentation. A statement regarding when, where and how scholarship awards will be given. This statement should include information regarding the appropriate payee (i.e. "The award recipient's undergraduate institution.")

g. Funding. Please provide evidence of scholarship funding availability including plans for fund raising.

Endowed Scholarships

Any person, corporate entity or government unit may seek to establish an Endowed Scholarship by submitting a scholarship program request form. Additionally, the requesting party must within three years deposit a minimum of \$18,500, an amount considered adequate to produce annual income of \$750, the minimum CTF Scholarship Grant. The requesting party must agree to either deposit additional funds, reduce the scholarship amount to not less than \$750, or not award the scholarship if annual income is not adequate to fully fund the scholarship(s) in a particular year. During the time that fundraising is ongoing, and before the Board has passed a resolution establishing the Endowed Scholarship, the term "Endowed Scholarship" may be used for fundraising purposes and the funds may be invested as an Endowed Scholarship so as to generate income. When the requesting party has deposited at least \$18,500 and the General Scholarship Standards have been met, the CTF Board will consider a resolution officially establishing the Endowed Scholarship. Endowed scholarship income will be moved into the distributable cash account annually. The distributable cash balance may not be larger than the amount awarded or scheduled for award in scholarships during the most recent disbursement year. CTF staff will make Scholarship coordinators aware that they have the option of either moving excess cash into their endowment or making larger scholarship disbursements. Moving cash into the endowment does not require board action.

*At our assumption of 4% growth a \$15,000 balance will not produce \$750.

Partnered Scholarships

Any corporate entity or government unit or agency may seek to establish a CTF Partnered Scholarship by submitting a scholarship program request form. If Caltrans related, all scholarship program requests must be authorized by signature of a Division Chief or Deputy District Director. In case of other organizations, an equal level manager must authorize and sign. Upon establishment of a Partnered Scholarship, CTF may commit to provide additional scholarship funds for each program as set forth in its Partnered Scholarship acceptance letter. It is CTF's preference that students selected for Partnered Scholarships are attending or accepted into California institutions.

Foundation Scholarships

CTF may determine at any point to grant scholarships out of its undesignated funds. CTF will establish the award amount, eligibility criteria and selection criteria that at least meet CTF general scholarship standards for any scholarships it may determine to grant. Foundation scholarship winners must be enrolled at an accredited California educational institution.

Mail or email the completed request to: California Transportation Foundation 3540 La Habra Way, Sacramento, California 95864 Email: sarah_west@transportationfoundation.org

The Executive Director is authorized to approve all requests that renew prior year scholarship programs but shall submit all new and revised Scholarship Program Requests to the Board for approval or disapproval. The requestor will be advised in writing when CTF has acted on his or her request.

Amended by the Board on December 15, 2020.