



P.E.O. Foundation
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Instructions for Scholarship Committees

Scholarships from funds administered by the P.E.O. Foundation will be disbursed in accordance with the following guidelines. Please follow these steps when processing and completing scholarship applications.

1. Selection of Recipients Using Established Criteria

Due to our charitable classification and in order to comply with P.E.O. Foundation requirements and IRS regulations, selection of recipients must be in accordance with established guidelines provided by the P.E.O. Foundation. These procedures involve using objective standards in selecting recipients and maintaining adequate records to show that specific procedures are being followed. Scholarships are for women who are high school graduates or equivalent and are enrolled in a post-secondary school in the U.S. or Canada. Study abroad is permitted, provided the student is enrolled in a U.S. or Canadian institution. Recipient must be a citizen or legal permanent resident of the U.S. or Canada and must be able to provide proof of such if requested.

Each applicant must be considered on the basis of her qualifications. Selection committees should establish written criteria by which to evaluate an applicant's qualifications. Such criteria may include, but are not limited to: scholastic standing, financial need, personal recommendations, plans for use of education and acceptance by school of choice. These criteria must adhere to restrictions specified by the fund, if any (e.g., field of study, residency requirement, institution to be attended, etc.).

To maintain and protect the charitable status of the P.E.O. Foundation, selection of recipients must be done in an impartial manner. There must be no favoritism for or against selection of an applicant because she is a member of the P.E.O. Sisterhood or is related to a member. A recipient cannot be chosen **solely** on the basis of a close relationship with (1) a member of the P.E.O. Sisterhood, (2) a trustee of the P.E.O. Foundation or an officer of the International Chapter of the P.E.O. Sisterhood, (3) a grantor or a substantial contributor to P.E.O. and/or the individual fund or member of the family of either, or (4) a corporation controlled by a grantor or substantial contributor to P.E.O.; or because the donor suggests or requests a particular individual to be given a scholarship. **An applicant related to a current member of the scholarship selection committee is NOT eligible for an award.**

2. Individual Case History Form – Completion and Approval Process

The chairman of the scholarship selection committee is responsible for completing the **Individual Case History** form for each recipient. The **Individual Case History** will show the recipient's name and address; last four (4) digits of her Social Security number or student identification number; name and location of school to be enrolled (must be enrolled in a U.S. or Canadian post-secondary institution); amount of scholarship; purpose for which the scholarship is to be used; and, manner of selection.

The **Individual Case History** will require the following information:

1. Is recipient a citizen or permanent legal resident of the U.S. or Canada?
2. Is recipient able to provide proof of citizenship or permanent legal residency, if requested?
3. Is recipient enrolled in a post-secondary school in the U.S. or Canada?
4. Was selection of recipient at the suggestion or request of donor, a member of the donor's family, or a substantial contributor to the fund?*
5. Is there a family relationship between recipient and a member of the scholarship selection committee? *
6. Is the recipient a member of the P.E.O. Sisterhood?*
7. Is there a family relationship between the recipient and:
 - a. A member of the P.E.O. Sisterhood? *
 - b. A trustee of the P.E.O. Foundation or officer of the International Chapter of the P.E.O. Sisterhood? *
 - c. The donor or a substantial contributor to the individual fund or any member of the donor's or contributor's family? *

* If the answer is "yes" to any of the above questions, you will need to describe the relationship.

Submit the completed **Individual Case History** online form to the P.E.O. Foundation office. Save one (1) copy for the chairman's file.

The P.E.O. Foundation Board of Trustees must approve the information submitted on the **Individual Case History** form to assure compliance with P.E.O. Foundation requirements and IRS regulations **BEFORE** the proposed recipient is notified of her award. Trustees do not approve recipients, only proper completion of the process. Disbursement of funds cannot be made until all requirements specified in this document are completed.

Following approval by a majority of the trustees, the chairman of the selection committee will be notified by email. **Allow four (4) weeks for this process to be completed.**

3. Online Completion for Acceptance of Scholarship and Confirmation of Enrollment Forms

An email will notify the chairman of the selection committee that the **Individual Case History** has been approved by the P.E.O. Foundation Board of Trustees. The chairman will then notify the recipient of the award approval by forwarding the notification email, which will also contain a link to the **Acceptance of Scholarship** and **Confirmation of Enrollment** forms. See below for further instructions related to each of these forms:

- A. **Acceptance of Scholarship form:** Recipient must complete this form and submit it as soon as possible to the P.E.O. Foundation office. In addition to the requested information, this form provides the recipient's written statement that these funds will be used for educational purposes. This is necessary to show that the scholarship is given in furtherance of the educational and charitable purposes of the P.E.O. Foundation. This form also provides information concerning publicity authorization/media release. Recipient should keep one (1) copy for her records.
- B. **Confirmation of Enrollment form:** Recipient must complete the top section of the form and submit to her school for their confirmation of her enrollment for the same school term for which the scholarship is being given. The P.E.O. Foundation office confirms enrollment directly with Cottey College. For all other universities, colleges or post-secondary institutions, the recipient is responsible for ensuring the **Confirmation of Enrollment** form is completed and submitted to the P.E.O. Foundation office through the link provided. Confirmation of **current** enrollment must be received by the P.E.O. Foundation office before any payment will be sent.

4. Disbursement of Scholarship – Payable after July 1

Approved scholarships are payable for the coming academic year and **cannot be paid before July 1**. The **approved Individual Case History, completed Acceptance of Scholarship and Confirmation of Enrollment forms must be received** by the P.E.O. Foundation office no later than **December 1** (of the current fall term) for first installment or no later than **March 1** (of the current spring term) for second installment (if applicable) or **the scholarship will be forfeited**.

Scholarships over US \$2,500 will be paid in two (2) installments. For the installments to be paid the recipient must ensure a **Confirmation of Enrollment** form for each semester is obtained and submitted to the P.E.O. Foundation office through the link provided. Scholarships for US \$2,500 or less are paid in a single payment. Disbursement of the approved scholarship is in accordance with instructions on the **Acceptance of Scholarship** form.

5. Files Retained Six (6) Years

It is not necessary to send copies of any documents required by the selection committee, such as letters of recommendation, grades, etc. to the P.E.O. Foundation; however, the selection committee should keep copies of all forms, documents and supporting files, including those for applicants not selected, for a minimum of six (6) years.

For historical purposes, a permanent list of awards should be kept for the life of the fund.

6. Other Information

All scholarship forms are for one (1) academic year only and new online forms will need to be completed and approved if the scholarship to the student is to be renewed.

If a scholarship is not used within the academic year (first or second semester) it will be voided. If the student should decide to accept the award in a subsequent year, new online forms will need to be completed and approved.

Approved scholarships that are not used remain in the scholarship fund and will be available for award in the next academic year.

It is the responsibility of the outgoing committee chairman to advise the P.E.O. Foundation of all contact information for the incoming committee chairman. Please use the *Fund Chairman Change Form* and submit online.