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06 December 2025 Draft

RSF Scholarship Selection and Award Specification[1]

Purpose

To provide scholarships[2] to qualified Contra Costa County high school and community college graduates to aid them in continuing their education at an accredited community college, college, university or vocational training school of their choice.

Eligibility Requirements

Applicants must:

- be a current high school senior or graduating community college student (or meet the requirements to transfer) in one of the RSF-selected schools
- have a total GPA of at least 3.00
- have a Student Aid Index (SAI) of no more than 32000
- plan to enroll full time at an accredited 2-year community college, 3-4-year college or university, or vocational training school

Application and Award Information

Applicants must provide the following information:

- Completed online application (list all mandatory information in the RSF application)
- Letters of recommendation
- Essays – entered in the online application or as a file upload
- Photo
- Official transcript
- Weighted grade point average (GPA) for high school; grade point average for community college
- Evidence of full-time enrollment (12 or more credits); required to obtain funds if awarded a scholarship

Selection Criteria

Applicants will be evaluated using the following criteria and a points-based approach:

- Financial need
- Academic achievement
- Letters of recommendation
- Leadership and extracurriculars

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[1] Per Shirley, this specification should exclude the Waterford scholarship program as they have different rules and timelines. It also should exclude the RWC employee/child process due to its differences.
[2] RSF, named, add-on

- Community service
- Personal character and essays
- Interview performance (conducted with RSF interviewers)

Roles & Responsibilities

The following RSF roles and responsibilities (defined in RSF policies and procedures) will be supported to execute the scholarship process and develop/maintain the designated work products:

- President
- Scholarship Committee (VP Scholarship, School Team Chairs/Co-chairs/Deputies, VP Technology, others)
- School interview team leads & interviewers
- Treasurer
- Trustees
- Friends of RSF
- Add-on award donors
- School counselors
- Student applicants (completed application submitted)[3]
- Student awardees (selected for scholarships)
- Student recipients (meet evidence of enrollment requirements; eligible for funds)
- Evidence of enrollment (EoE) process administrator
- Technology Committee
- Finance Committee
- Events Committee

Key Work Products

The following work products will be produced, supported, and maintained:

- Scholarship timeline (partially specified in Responsibilities of Standing Committees; G. Scholarship Committee)
- Scholarship calendar of events
- RSF website (link to scholarship application)
- G Drive (archival of identified work products)
- Scholarship application (includes instructions to students)
- Awards calendar
- Student qualifications and criteria
- List of participating high schools and community colleges
- School counselor information packet
- School counselor contact information
- Description of named scholarships
- Description of add-on awards
- Trustee information packet (for conducting interviews)

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[3] I created these distinctions as students move through the process

- Student application summaries
- Student applications (online)
- Student application status reports by school
- Online applicant evaluation form
- Rollup (applicant scores and rankings for each school, type of award; awardees)
- Evidence of enrollment form
- Student mobile phone number database
- Communication tool (texting)
- Scheduling tool (interviews)
- Awards brochure
- Past recipients posters for each school

Scholarship Process

Funding & Planning
- Determine total scholarship funds, award amounts, number of awards (treasurer recommendation, full board decision).

Setup & School Engagement
- Assign school team roles (chair, co-chair, deputy) and notify trustees.
- Update application, calendar, information packet for school/financial aid counselors, counselor contact information, descriptions of named scholarships and add-on awards, RSF website, application supporting the scholarship process.
- Meet with counselors/principals (information packet, application requirements, timeline, counselor responsibilities, poster of past year's recipients).
- Update and distribute trustee interview packet (interview, evaluate, score applicants).
- Train school chairs and co-chairs/deputies on the scholarship application (currently Kaleidoscope)
- Recruit and train school interviewers (trustees, friends of RSF).
- Develop status monitoring and reporting; identify reports, frequency, report recipients.

Interview & Evaluation
- Assign interview teams, set interview dates, schedule, notify, confirm students; provide teams with all interview logistics and applicant information.
- Conduct applicant interviews.
- Score and rank applicants at the completion of each interview session using defined evaluation criteria.
- For each school, enter applicant scores and rank order in rollup.
- In rollup, identify applicants eligible for add-on awards and named scholarships.
- In rollup, confirm applicant name, school, home address, mobile phone number, permanent (not school) email address
- Automate communications with students (e.g., notifications, acceptances, reminders, information due/incomplete)

Award Selection
- Hold trustee vote on applicant rollup to select awardees.
- Select awardees of RSF scholarships; enter in rollup
- Based on awardees of RSF scholarships, select awardees of named scholarships; enter in rollup
- Provide RSF scholarship awardee information to add-on award donors; select awardees of add-on awards: enter in rollup

Notifications & Ceremony
- Notify selected awardees and non-selected applicants.
- Invite all participants (recipients, family, counselors, principals, etc.) to awards ceremony.
- Prepare award certificates and attendee nametags.
- Prepare awards brochure.
- Conduct awards ceremony.
- Request valid evidence of enrollment information from all awardees (evidence of enrollment form; confirmation of enrollment in a qualified institution, evidence of full-time course registration (at least 12 hours)).

Enrollment Verification & Funds
- Validate evidence of enrollment information and update awardee status to recipient in rollup.
- Archive all awardee EoE documents (see Data Management)
- Securely obtain and store awardee banking information.
- Disburse funds via secure ACH transfer.

Post Process Review
- Conduct lessons-learned review; identify (and schedule?) areas for improvement.
- Maintain scholarship records and awardee contact information.

Data Management
- Archive identified work products on the Google Drive throughout the process as needed.
- Update the RSF web site throughout the process as needed.

Historical Awardee Contact and Tracking (new)
- Contact each recipient a specified timeframe after their award to obtain information on how they are doing and what they are doing.[4]
- Define, collect, and track metrics on the effectiveness of the RSF awards program (see Notes).

Process Timeline
Key process timeframes and milestones include the following:

- Process start: July of the coming school year
- Process complete: when all scholarship funds have been disbursed to recipients, typically 18-20 months after the process starts (exception: deferred scholarships)

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[4] Shirley suggests contact via text, 2 years after award disbursement for community college recipients and 4 years after award disbursement for high school recipients.

- Determine the number of add-on awards prior to opening applications
- Applications open: November
- Scholarship application training (trustees, friends, interviewers?): December
- Interview training (trustees, friends, interviewers): January
- Preliminary report of scholarship funds, award amounts, number of awards (treasurer recommendation): January
- Applications close: January
- Interviews conducted: January/February
- Final determination of number of awards (treasurer recommendation, full board decision): February
- Rollup scores due: March
- Approval of scholarship awardees: March
- Send out add-on scholarship information to donors (after approval?); donors notify board of add-on awardees: late March
- Prepare awards ceremony brochure; send to printers: early/mid-April
- Awards ceremony: May
- Request/validate EoE information from all awardees: July through end February
- Disburse funds to all recipients: July through end February (except for deferred awards)

Notes

Under Interview and Evaluation (Bob Miller)

Here are some things to consider regarding interview scheduling and interview membership based on lessons learned from the last and previous years:

- Maximize the available interview days per individual to maximum flexibility for the selection and matching of interview team membership. To provide the largest universe of available days to select from, have each person provide their availability for each day of the HS and CC interview periods rather than signing up for a particular school's interview days.
- To facilitate interview team selection and matching, have a document (possibly an Excel spreadsheet) that integrates interviewer availability by day vs school(s) interview schedule(s) by day.
- Scholarship VPs are responsible for selection of interview team members
  - Consults with school team chairs as required
  - Interview teams consist of experienced and inexperienced interviewers
  - Strive to limit each person to 2 interview sessions
  - Due to the prep time required for each interview session, strive to avoid assigning a person to interview sessions on consecutive days
  - Where possible, for those that haven't interviewed at both HSs and CCs, provide them with the opportunity to interview at the missing school type.

o For the larger schools that require multiple interview sessions with different interview teams, to facilitate an equitable final ranking of interviewees from the school, have each interview session include the same or about the same number of interviewees.

Under Award Selection (Barbara Walker, Peter Yang)

- 2/27: Community college interviews close
- 3/6: Roll ups due by 7:00 am (school team chairs); all rankings for HS and CC applicants available (final status spreadsheet with all interviewed students plus the ranking result of interviews); available to scholarship committee chairs and corresponding secretary
- 3/6 – 3/8: Treasurer to provide cut off threshold (percentage of ranked students to receive scholarships, e.g., 70% or 75%)
- 3/10: Consider **confidentially** sending student applicants above cutoff threshold to add-on scholarship donors for their selection (awardees yet to be announced). If delayed until full board approval, may impact awards ceremony brochure completion.
- 3/18: Full board to approve awardees
- 3/25: Add-on donors notify board of add-on awardees
- 4/13: Awards ceremony brochure completed and sent to printer

Under Historical Awardee Contact and Tracking (Bob Miller)
Implement a repeatable process building upon and supplementing an existing database of recipients (in
Kaleidoscope or a successor scholarship application platform) that enables RSF to collect and track outcomes to measure the impact of its awards.

- Captures and maintains communications with recipients over time; text compatible.
- College graduation and date
- Career information and successes
- Written, video, or in-person testimonials

Important in cultivating and stewarding donors to demonstrate the impact of RSF scholarships through data, testimonials, and recipients that can tell our story. A current example is Frank Nelson who received an RSF scholarship several years ago, has a successful career, and is now a substantial donor. He's an example of closing the circle. These types of stories resonate with donors.