

Oneida Trust Scholarship Fund Policy and Procedures

Article I. Statement of Purpose

1-1. The primary purpose of this fund is to establish a trust resource for providing financial aid scholarships to assist eligible enrolled Oneida Tribal members in securing higher educational opportunities based on established criteria. This fund is intended to provide assistance for Higher Education financial needs not being met by Tribal contribution.

1-2. The General Tribal Council delegated the responsibility of developing a plan for the unused Individual Indian Monies held within the Bureau of Indian Affairs to the Oneida Trust/Enrollment Committee. That plan became the Oneida Higher Education Scholarship Trust Fund.

1-3. The Oneida Trust/Enrollment Committee recognizes that protection of the Oneida Tribe's future depends on the continued effort to assist tribal members in attaining their goal of higher education. It is essential that financial assistance be considered in the over all plan to attain the highest degree of education possible.

1-4. The Oneida Trust Committee respectfully requests that all recipients of the Oneida Trust Scholarship Fund keep in mind the prospect of returning to the Oneida Tribe to share their acquired knowledge, experience, and education.

Article II. Definitions

2-1. This article shall govern the definitions of words and phrases used within this policy. All words not defined herein shall be used in their ordinary and everyday sense.

(a) "Unique needs" means funding needs not met by Tribal contribution and are within the applicants academic plan.

Article III. Eligibility and/or Qualifications

3-1. Eligibility shall consist of the following :

(a) Enrolled members of the Oneida Tribe of Indians of Wisconsin.

(b) Applicants must be seeking higher educational opportunities and must be in need of fulfilling college entrance requirements to become officially accepted into an accredited post secondary learning institution. The scholarship must assist with required pre-requisite credited classes, post-graduate preparation and admission exams, or related preparatory courses.

(c) The Trust scholarship will remain dependent on the student being in good standing with the Oneida Higher Education Office. A 2.0 grade point average for undergraduates and a 3.0 for graduate students where applicable.

3-2. The Oneida Trust Scholarship contributions shall be made for the amount approved by the Oneida Trust/Enrollment Committee dependent upon the guidelines in Article 5.

Article IV. Selection

4-1. Awards will be processed in order of a complete receipt of application and subject to the availability of funds.

4-2. Applications completed after the class/term/exam ends are not eligible.

Article V. Guidelines

5.1. The following guidelines are established to assist with the determination of the Trust Scholarship award:

(a) Expenditures of the Oneida Trust Scholarship Funds shall provide financial resources to the Higher Education Department for student financial assistance under Article 3.1 for unique needs and are not to be used for offsetting tribal contribution.

(b) Applicants seeking college entrance requirements in the form of required credits, post-graduate entrance exams fees and related preparatory courses, or pre-requisite classes can receive a one time scholarship up to \$2,500.

(c) Students must abide by the established Higher Education program guidelines.

(d) The final decision to make an award is the responsibility of the Oneida Higher Education Office.

(e) Any funds unexpended shall revert to the Oneida Trust Committee Education Endowment Fund annually.

Article VI. Appeal

6-1. In the event an applicant wishes to appeal, the following procedures shall be followed:

(a) Any applicant that has been denied funding may file either personally or through a representative an appeal for reconsideration of funding.

(b) The appeal shall be filed with the Oneida Higher Education Director. The appeal shall

be in written form and provided to the Director within ten (10) calendar days of receipt of notification of denial.

(c) If an agreement cannot be reached by the applicant and the Higher Education Director, the applicant may file an appeal with the Trust/Enrollment Committee within ten (10) calendar days of receiving the decision from the Higher Education Director. Notwithstanding the provisions of Article V, section 4, of the Trust/Enrollment Committee Bylaws, the decision of the Trust/Enrollment Committee shall be final.

6-2. A majority of the Trust/Enrollment Committee shall constitute a quorum of the Oneida Trust/Enrollment Committee. The Oneida Trust/Enrollment Committee shall act in accordance with the requirements of the Committee's bylaws and other governing documents.

Article VII. Budgetary and Reporting Responsibilities

7-1. Expenditures are based on the Trust annual disbursement.

7-2. The annual disbursement shall be valued by the Oneida Trust Committee during the month of January. The amount shall be derived from the Trust Scholarship Portfolio per the Investment Policy, which is designed to maintain the principal as perpetual. The Trust contribution shall be paid to the Higher Education Office in April.

(a) Semi-Annual reports shall be provided to the Oneida Trust/Enrollment Committee by the Oneida Higher Education Office by October 1 and April 1 of each year.

(b) Information shall be detailed in order to allow the Oneida Trust/Enrollment Committee to prepare semi-annual reports to the Oneida General Tribal Council on expenditures of the fund.

(c) Semi-annual reports shall include information on awards from the Higher Education Office to the Oneida Trust Committee and the report shall consist of the scholarship award amount, school, major seeking, and status with no identifying information of the recipient.

7-3. The Oneida Higher Education Office shall:

(a) Provide notification to the General Tribal Membership through the Tribal newspaper and Oneida Higher Education brochures that the Oneida Trust Scholarship funds are available.

(b) Provide the Oneida community and interested individuals with a brief outline of the policies and procedures.

(c) Utilize and develop internal systems which will assure there are standard application forms which contain a statement stressing the contents of the Policy Statement, standardize

a student signature sheet to indicate the student understands and agrees to the rules of the program and develop other internal controls as needed.

(d) Maintain records on the Higher Education AS400 Financial aid data base system.

(e) Maintain minutes of all meetings that provide disposition of all requests.

Article VIII. Management

8-1. Management and authority of the Oneida Trust Scholarship Fund remains the responsibility of the Oneida Trust/Enrollment Committee.

8-2. Management of the allocated scholarship portion of the Oneida Trust Scholarship fund shall be delegated to the Oneida Higher Education Office. No Higher Education Office administrative charges are authorized from the Oneida Trust Scholarship Fund.

8-3. Management shall include:

(a) Internal guidelines

(b) Standardization of Forms

(c) Draw down of funds by the Oneida Trust Committee for scholarship allocation.

IX. Students in Default

9-1. Students who are in default with previous student loans will not be eligible to receive this Scholarship Fund until all accounts have been remedied with proper documentation.

X. Policy Review

10-1. The Oneida Higher Education Office and the Oneida Trust Committee shall jointly review and update this policy as requested by either party, and upon approval of the Oneida Business Committee. Any changes shall be in writing, requiring official action by the Oneida Trust Committee, and shall not be on a case by case basis. The purpose would be to assure that the limited resources are expended consistent with this policy and to ensure this policy meets the needs of Oneida students the Higher Educations Department, and the Oneida Trust Committee.

10-2. In the event a conflict arises as to the Guidelines set forth in Article V of this Policy and the Guidelines for the Oneida Trust Scholarship Fund as stated in the current Oneida Higher Education Office Handbook, the Oneida Higher Education Handbook Guidelines shall take precedence. All other provisions of this Policy shall supercede the Oneida Higher Education Handbook.

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