

# BONNER SCHOLARS PROGRAM

## RULES

### Section I: Recruitment & Selection

#### 1.1 Recruitment

- The recruitment of Bonner Scholars should be integrated into the year-round admissions process so that applications to the program are solicited along with the regular applications to the college and, thereby, used as a recruitment and yield tool.
- To make it easier to coordinate the Bonner Scholar selection process with the college's own selection process, schools that are not on a rolling admissions process may opt to use the following process to select their incoming class:
  - Recruit new Bonner Scholars so that applications to the program are due on the same date as the college's admissions deadline;
  - Coordinate your selection of incoming Bonner Scholars with your college's selection of the freshman class to ensure that you are working from the pool of students who will be offered admission by the college;
  - Submit your selected pool for approval by the Foundation to ensure that it meets our guidelines, basing the total number of initial award letters on your school's own yield history (e.g., if your school typically yields 50% of accepted students, then you would be allowed to admit twice as many Bonner Scholars as you have spots);
  - Send award letters to the approved selection list of Bonner Scholars on the same day (or within several days) of your school sending its admission letters, thus ensuring that prospective students are able to make their decision regarding which college to attend knowing their status with the Bonner Scholars Program.
  - Note: In the event that the yield of Bonner Scholars is higher than projected, your school would be allowed to keep those students with the understanding that: (a) the following year you will use a higher yield figure for the Bonner Scholars program, and (b) the students above the college's Bonner class size would not be replaced until the class falls below its allotted size.

## **1.2 Selection Criteria**

Each incoming Bonner Scholar must meet the following criteria:

### **1.2.1 Academic Requirements**

- Meet the academic admissions requirements of the participating institution.
- Graduate in the top 40% of his or her high school class. Exceptions may be made on an individual basis, including exceptions for students who have earned a Graduate Equivalency Degree (GED).
- Demonstrate a commitment to making connections between their service activities and their academic life.

### **1.2.2 Community Service Requirements**

- Demonstrate that he or she has held a role(s) with significant responsibility at home, in church, at school, or in their community.

### **1.2.3 Financial Requirements**

- No less than 85% of the incoming class must have parental contribution below \$7,500 (e.g., 17 out of a class size of 20) *and* the average parental contribution of this group must be at or below \$4,500.
- No more than 15% of the incoming students may have parental contribution above \$7,500 (e.g., three out of a class size of 20).
- Changes in parental contribution after the freshman year will not disqualify a Bonner Scholar. However, every effort should be made when selecting incoming Bonner Scholars to ensure that the program helps those students with the greatest financial need.

### **1.2.4 Diversity**

- Achieve the gender balance that exists at the school as a whole (with no less than 40% of either male or female students);
- Seek to increase the racial or ethnic diversity of the incoming class as compared to the school as a whole, with the goal to at least double the students of color representation in the Bonner Scholars Program compared to the school as a whole.

## **1.3 Approval of New Students**

- Prior to sending your acceptance letters, your school must send a list of each incoming class of Bonner Scholars to the Foundation for approval. The Foundation will ensure that the financial and diversity selection criteria for the class as a whole are met. The merits of individual candidates are not considered in the Foundation's review.

- The size of the incoming class will consist of exactly one-quarter of the total Bonner Scholars allowed at the institution (i.e., a school with 40 total Bonner Scholars may select an incoming class of 10).
- The list of incoming Bonner Scholars sent to the Foundation for approval should contain the following information: name, graduation year, gender, race, estimated family contribution (EFC), first in family to attend college, home town and state.

#### **1.4 Replacement Students**

- First- and second-year Bonner Scholars who withdraw from the program for any reason may be replaced. The following restrictions apply:
  - Bonner Scholars may be replaced before the start of their third year;
  - All Bonner Scholar replacements must have parental contribution below \$9,500;
  - Bonner Scholar replacements must be in the same class as the student they are replacing.
- The process used for selecting replacement students must be approved by the Foundation.
- A Change of Status Form for every replacement Bonner Scholar must be submitted and approved by the Foundation prior to the student being sent an acceptance letter by the program.
- Students cannot replace Bonner Scholars mid-semester or mid-summer.
- Replacement Bonner Scholars are only eligible to receive Bonner Scholarship support for the remaining term of the student they are replacing.
- The loan reduction fund will be pro-rated for replacement Bonner Scholars (see Section 4.4.4).

#### **1.5 Transfer Bonner Scholars**

- A Bonner Scholar in good standing who transfers to another Bonner college is eligible to transfer their scholarship to that school, but is not guaranteed a spot. Instead, transfer Bonner Scholars must join the pool of other replacement Bonner Scholar candidates and go through the same application and selection procedure.

#### **1.6 Dismissal**

- The formal procedure for reviewing and dismissing Bonner Scholars who do not meet the expectations of the program must be reviewed and approved by the Foundation.

- The dismissal policy and related procedures should be given to all students in writing at the beginning of the school year.
- Directors who are considering dismissing a student from the program are encouraged (but not required) to consult with the Foundation before any dismissals are made.

## **1.7 Retention**

- Every effort should be made to ensure that the retention rate of Bonner Scholars exceeds that of the general student population.

# **Section II: Program**

## **2.1 Community Service Requirement**

- For the purposes of the Bonner Scholars Program, “community service” is defined as service provided to individuals or communities to meet social, educational, or environmental needs. This service may be provided directly or indirectly through a student-initiated project or a project sponsored by a non-profit or government agency.
- The following activities will not count towards meeting a Bonner Scholar’s service requirement either during the school year or in the summer:
  - service on behalf of a private, for-profit company or organization;
  - service on behalf of a political organization or campaign (*voter registration drives are allowed*);
  - pure, scientific research in a laboratory;
  - ROTC or any other military service;
  - activity whose primary focus is to support worship, evangelical and proselytizing activities within church or para-church organizations. These activities include, but are not limited to, service that focuses on religious instruction, indoctrination or conversion. Examples include providing childcare at church in support of a worship service, teaching in evangelical and proselytizing programs, participating in a worship service, and clerical and/or administrative work for the organization. *Please note that service with a religious or para-religious organization for the purpose of providing direct community service (e.g., tutoring, mentoring, providing goods to those in need, community justice programs, and crisis intervention) does qualify for Bonner service hours.*

### **2.1.1 School-Year Service**

- Bonner Scholars are required to perform an average of ten hours of community service a week during the academic year for a total of not less than 280 hours to fulfill the school-year service requirement.
- Bonner Scholars are not permitted to “bank” hours during certain terms of service (one month or more) that will then be applied to meet the service expectation in future terms.
- First-year Bonner Scholars may apply their First-Year Service Trip hours towards their school-year hour requirement.
- *No less than half* of a Bonner Scholar’s service hours must be spent in “direct, hands-on” community service activities such as tutoring, visiting the elderly, environmental clean-up, building a home, renovating a playground.
- *No more than half* of a Bonner Scholar’s service hours may be spent in “indirect” community service activities such as administrative tasks related to the Bonner Scholars Program or action research on behalf of a community group.

### **2.1.2 Summer Service**

- Every Bonner Scholar is required to complete at least two summers of full-time community service defined as at least 280 hours over at least seven weeks, with a minimum of 40 hours per week.
- Bonner Scholar replacements who begin the Bonner Scholars Program in their freshman or sophomore year are required to do two summers of service; Bonner Scholar replacements who begin in their junior year are required to do one summer of service.
- Students who do not plan to return to the Bonner Scholars Program in the fall are not eligible to participate in the summer service program. However, if, after completing the summer service, a student decides to take a leave, he or she will receive the summer earnings upon his or her return (see Section 4.4.2 for Summer Earnings allocation guidelines).

## **2.2 Orientation**

- Each year an orientation should be convened before the school year begins for all first-year Bonner Scholars to build community among the Bonner Scholars, provide enrichment activities, and begin preparing them for their service and other responsibilities.

### **2.3 Training and Enrichment**

- Bonner Scholars should receive initial and on-going training to prepare and strengthen their skills and knowledge for their service work. This training should be appropriate to each stage of the student's personal development and service responsibilities.
- Each school should include a description of training and enrichment activities in its annual report.

### **2.4 Placement**

- Bonner Scholars should be placed in their service sites within the first four to five weeks of their first year in the program. The weekly service hours during that time should be filled with further orientation, training, and group-building and/or service activities.
- Bonner Scholars should be following the Comprehensive Placement Process for both school-year and summer service placements, with special attention to the Community Learning Agreement (*see the Bonner Director's Handbook for a description of this process*).
- Bonner Scholars should use the Bonner Web-Based Reporting System for: (a) recording their Community Learning Agreement, (b) logging in their hours for community service and training and enrichment activities, (c) summarizing their service activities at the end of each semester and summer, and (d) reviewing their Community Learning Agreement at the end of each term.

### **2.5 Regular Meetings**

- Regular meetings should be organized for (and by) Bonner Scholars for education, training, and enrichment purposes.
- Directors and/or coordinators are encouraged to meet one-on-one with Bonner Scholars at least once each semester and more often with those students who are having academic or personal difficulties.

### **2.6 Reflection**

- All Bonner Scholars should participate in some form of reflection related to their service experience. Reflection may take many forms, including journal-keeping, weekly small group meetings, or some form of artistic expression.
- The Foundation encourages links between the Bonner Scholars Program and the academic curriculum.

## **2.7 Student Evaluation**

- Bonner Scholars should complete a “review” of their Community Learning Agreement at the end of each semester and summer. We encourage their site supervisors to complete a student review using the form generated by the Bonner Web-Based Reporting System.
- In addition, we encourage coordinators/directors to use an evaluation form to solicit feedback from the community agency site supervisors on their experience as hosts to Bonner Scholars.

## **2.8 Student Impact Surveys**

- Directors must ensure that first-semester freshmen, first-semester juniors, and second-semester seniors complete the Bonner Student Impact Survey, and that the completed surveys are submitted in a timely fashion.

## **2.9 Bonner Cluster Event**

- Bonner Scholars are expected to attend a regional training event during their first or second year in the program. These events should be organized each year on a rotating basis by the six geographically based Bonner campus clusters.
- The goal of this event is to expose Bonner Scholars to the larger Bonner network and provide an opportunity for leadership training, reflection, and planning their service activities for the summer and beyond.
- Each campus has \$50 per first-year Bonner Scholar added to their fall semester Bonner Administrative Fund award to help cover the costs for the Cluster Event. In addition, upon request, the Foundation will allocate \$50 each for up to three junior or senior students to attend the cluster event. (Schools should make this request prior to the fall allocation, if possible, or, at the latest, prior to the spring’s allocation so that the additional amount can be included in the semester’s allocation.) Schools attending a particular cluster event may agree to pool their funds in order to support the additional costs assumed by the host campus (see Section 4.4.5 for Administrative Fund allocation guidelines).

## **2.10 First-Year Service Trip**

- All Bonner Scholars are required to participate once, during their first (or in compelling circumstances, second) year in the program, in a service trip to a geographic region outside their campus community. These events can be organized each year either during winter, spring, or summer breaks, although the Foundation encourages schools to organize these trips for the first week of the summer.
- First-Year Service Trip hours may count towards meeting the student’s school-year service hour requirement.

- Directors/coordinators may apply to the Bonner Foundation for financial support of up to \$250 per Bonner Scholar taking the trip and \$250 for each of two people attending in a supervisory capacity (see 4.4.8 for First-Year Service Trip allocation guidelines).
- Schools should submit a final report of the trip in the Annual Report (see Section 5.4.1 for a description of the Annual Report requirements).

### **2.11 Senior Bonner Presentation of Learning & Community Impact**

- Every Bonner Scholar should make a “presentation of learning and community impact” to an audience of other Bonner Scholars, Bonner Advisory Committee members, and others, as determined by each campus. These presentations may include videos, photographs, essays, poems, or any other form that the student chooses.

### **2.12 Senior Exit Interview**

- The Bonner Scholar director and/or coordinator should conduct an “exit interview” for graduating Bonner Scholars.

### **2.13 Senior Bonner Intern**

- Each year Bonner directors and coordinators are encouraged to identify a senior Bonner Scholar who would serve his/her Bonner service hours as an intern to assist with the management of the Bonner Scholars Program and/or to take on special initiatives of the program, including helping with freshman orientation, planning service trips, and leading small group discussions.
- In addition, Bonner directors and coordinators are encouraged to consider having their Bonner senior intern’s summer placement be with them so the intern can help with summer preparations for the coming school year.

### **2.14 Campus-wide Service Program**

- Efforts should be made whenever possible to use the Bonner Scholars Program to inspire and develop campus-wide involvement in service activities.
- The operation of the Bonner Scholars Program should be closely linked to the campus-wide community service and service-learning efforts.

### **2.15 Attendance at Meetings Sponsored by the Bonner Foundation**

- Bonner Scholars Program directors and coordinators are required to attend the Fall Directors Meeting (usually beginning the second Sunday of November) and the Summer Leadership Institute (usually in early June), organized by the Foundation.
- Newly hired Bonner Scholars Program directors and coordinators are required to attend the New Directors Orientation organized by the Foundation (usually held beginning the last Sunday in July in Princeton, New Jersey).

- Bonner Student Congress representatives are expected to attend the annual meetings organized for them by the Foundation, usually held just prior to the Fall Bonner Directors Meeting and in the summer just prior or during the Summer Leadership Institute. Campuses may apply for financial support when needed to send their student representatives to these meetings, with a cap of \$250 per student per meeting (see Section 4.4.7 for directions for requesting a reimbursement for Bonner Congress travel expenses).

## **Section III: Administration**

### **3.1 Program Staff**

#### **3.1.1 Staff Levels**

- All Bonner Scholars Programs must have one staff person who administers the program full-time, year-round. This person should have the title of either director or coordinator.
- In addition to the above staff member, programs with more than 40 Bonner Scholars must have additional staff administering the program, as follows:
  - Programs with 60 or more Bonner Scholars must have at least one more half-time equivalent staff member supporting the program.
  - Programs with 80 or more Bonner Scholars must have at least one more full-time equivalent staff member supporting the program.

The second position may be filled through a combination of professional and work-study staff. For instance, a chaplain or assistant director of student life could be assigned to provide oversight of the program at 25% of his or her total responsibilities, with the remaining 75% covered by three 10-hour-a-week work-study students.

#### **3.1.2 Reporting to President**

- The director of the Bonner Scholars Program should report directly to the president on matters concerning the program, even if the director's immediate supervisor is not the president.

#### **3.1.3 Responsibilities**

- The Bonner Scholars Program staff is responsible for coordinating the operation of all aspects of the Bonner Scholars Program, including recruitment, selection, orientation, training, placement, reflection, enrichment, and evaluation.

- Among other responsibilities, program staff should utilize and coordinate other available institutional resources to support students and the program, including the offices responsible for admissions, financial aid, student life, religious life, internships and career development, fundraising, public relations, alumni affairs, athletics, study skills, health, and counseling.
- The Bonner director is responsible for communicating the program rules (and all changes when they occur) to all relevant administrators on campus, as well as to the Bonner Scholars.

### **3.2 Student Leadership**

- Bonner Scholars should have opportunities for leadership roles in all aspects of the program.
- Programs are encouraged to have written Bonner constitutions that define the rights and responsibilities of Bonner Scholars and describe a student leadership structure for key program areas such as recruitment, selection, regular meetings, advisory committee, placement, budget, and communication. Bonner Scholars should be encouraged to write internal handbooks and guidelines that govern the establishment and operation of these committees.

### **3.3 Committees**

#### **3.3.1 Selection Committee**

- The Selection Committee should consist of at least one person from the following categories: coordinator/director, admissions office, financial aid office, Bonner Scholars, faculty, and community leader.
- The Selection Committee is responsible for overseeing the entire process of recruiting and selecting incoming Bonner Scholars, including:
  - Reviewing appropriate marketing, recruitment, and application materials;
  - Reviewing applicants for strength of qualifications;
  - Reviewing the profiles of each incoming class to assure that students meet the selection criteria;
  - Reviewing materials and history on Bonner Scholars who withdraw from the program, using insights gained as a guide to refining procedures for selection of future Bonner Scholars.
- Institutions may combine the Selection Committee with the Advisory Committee (below).

#### **3.3.2 Advisory Committee**

- The Bonner Scholars Program Advisory Committee should be made up of representatives from the same categories as the Selection Committee (see above).
- We recommend that the Advisory Committee meet at least twice each year.
- The Advisory Committee is responsible for overseeing the entire Bonner Scholars Program, including:
  - Evaluating the quality and impact of the Bonner Scholars Program on and off campus;
  - Locating sources of needed support (financial and otherwise) for the program;
  - Receiving reports from the program director and the Selection Committee on issues related to student recruiting, selection, retention, and support, as well as on- and off-campus administrative, enrichment, and service activities during the school year and summer.

## **Section IV: Finances**

### **4.1 Bonner Scholarship & the Financial Aid Package**

#### **4.1.1 Meeting Total Educational Need**

- Beginning with the Class of 2008, the institution, through its financial aid office, will provide a financial aid package that meets the total documented need for the total cost of education (some define this as “Cost of Attendance”) of a Bonner Scholar. Total cost of education includes both direct costs, such as tuition, room and board, and indirect costs, such as books, medical insurance, incidental expenses, and travel (see Bonner Agreements signed by your institution for more information on this requirement).

#### **4.1.2 Student Loans**

- Only subsidized Stafford, Perkins or equivalent loans may be used in meeting a Bonner Scholar’s documented need. The amount of loans to meet full documented need of the total cost of education may not exceed that which is allowed under the Stafford Loan Program (currently in 2002: Freshmen \$2,625; Sophomores: \$3,500; Juniors and Seniors \$5,5000. See Bonner Agreements signed by your institution for more information on this requirement.

#### **4.1.3 Federal Work-Study**

- Bonner Scholars may be packaged with Federal Work-Study for their Bonner service hours.

#### **4.1.4 Consideration for Commuter Students**

- At a minimum, schools must meet the unmet need of the direct cost of education for commuter students. The schools can determine financial aid for commuter students on a case-by-case basis. This policy will be reexamined periodically.

#### **4.1.5 Consideration for International Students**

- For international students, the Bonner Foundation's financial aid requirement will be implemented on a case-by-case basis. This policy will be reexamined periodically.

### **4.2 Term of Scholarship**

#### **4.2.1 Four-year Scholarship**

- The Bonner Scholarship is a four-year scholarship that provides financial support to students for a total of eight semesters and up to three summers. Fifth- and sixth-year "seniors" will not be eligible for continued Bonner Scholarship support.

#### **4.2.2 Leaves of Absence**

- Students may take a leave of absence from the program and/or the college and still remain eligible for the remainder of their four years of Bonner Scholarship support. The Foundation will cease allocating Bonner Scholarship funds for students while they are on leave.
- Students on leave should not be replaced if they are expected to return. However, if a student who withdraws during their leave is replaced by another student but then subsequently decides to return to college, the replaced student must join the pool of replacement candidates to be considered for re-admission into the program.

#### **4.2.3 Off-Campus Programs**

- Bonner Scholars participating in off-campus programs (e.g., Washington, DC semester, junior year abroad, exchange) are still eligible for Bonner Scholarship assistance as long as they continue to meet the service expectation of 10 hours per week during the school year.
- Bonner Scholars enrolled in academic programs that take them away from campus for the final year or two of their college career will not be eligible for the scholarship during those years away from campus (e.g., 3/2 engineering or nursing programs).

## **4.3 Bonner Foundation Grant Categories**

### **4.3.1 Regular Funding Provided in Semester Allocation Awards**

- The following grant categories are awarded on a per-student basis, based on the enrollment levels reported on the fall and spring semester Registrar's List provided to the Foundation.
  - School-Year Support
  - Community Fund
  - Administrative Fund
- The following grant categories are awarded on a per-student basis for the summer semester based on the Registrar's List provided to the Foundation:
  - Summer Earnings
  - Summer Living
  - Loan Reduction (for graduating Bonner Scholars)
- Occasionally, the semester when these allocations are made will not fit the above pattern (e.g., a Bonner Scholar graduates at the end of the fall semester).

### **4.3.2 Additional Funding Provided on an Application or Reimbursement Basis**

- The following grant categories are awarded on the basis of an application proposal or on a reimbursement basis.
  - Bonner Student Congress Travel
  - First-Year Bonner Service Trip
  - Rising Senior Summer Enrichment Fund
  - Summer Service Placement in Local Campus Community

## **4.4 Allocation Guidelines**

The amount and process for disbursing Bonner Scholarship funds should be made known to the Bonner Scholars in writing and through a meeting with a financial aid officer as part of the Bonner Scholars Program Orientation at the beginning of the year. Please note that Bonner Scholars Programs that receive annual funding from the Bonner Foundation will receive these funds directly from us, while those programs supported from their Bonner endowments will access these funds from that source. The funds should be disbursed as follows:

### **4.4.1 School-Year Support**

- \$2,100 per Bonner Scholar is allocated during the school year (\$1,050 per semester) to support the Scholar's educational costs (i.e., books, transportation, and personal expenses).

- The School-Year Support portion of the Bonner Scholarship should be paid directly to each student in the form of a series of at least three separate checks paid during the semester.
  - The disbursement schedule should be announced in writing at the beginning of the school year so students can set up their personal budgets.
  - Each institution should establish a process for ensuring that students are completing the required service hours before receiving their School-Year Support checks (see Section 2.1.1 for school-year service hour requirements).
- The School-Year Support should be disbursed directly to Bonner Scholars regardless of their indebtedness to the institution for direct educational costs such as tuition, room, board, and fees. (At many institutions this requirement will differ from the standard treatment of financial aid.)
- Bonner Scholars may elect voluntarily to have a portion or all of their school-year funds deposited in their student account to pay for tuition, room, board, or books and academic supplies charged to the bookstore.
- During the school year, the only form of additional payment Bonner Scholars may receive is Federal Work-Study payment. They may not receive payment from their service site.
- If a Bonner Scholar withdraws from the program in the middle of a semester, the balance of the school-year support should be reimbursed (see Section 5.3.1 for a description of the reimbursement process).

#### **4.4.2 Summer Earnings**

- *Beginning with the Class of 2005*, up to \$1,500 in summer earnings is awarded to each Bonner Scholar who completes his/her required summer service expectation.
  - These funds are available for two summers only.
  - These funds are allocated to the college in the summer allocation award, but are payable to the student only *after* completion of the 280-hours-over-seven-weeks service requirement.
  - Summer Earnings may be awarded on a pro-rated basis, upon prior approval by the Foundation.
- The \$1,500 Summer Earnings portion of the Bonner Scholarship may be paid directly to each Scholar or credited to his/her student account to meet the institution's minimum "prior-year earnings" or "student contribution" requirement.

- In addition to their Summer Earnings, students may be paid for their summer service work, either through Federal Work-Study and/or their service site.
- Bonner directors or coordinators must inform site supervisors that Bonner Scholars have Bonner Summer Living and Earnings funds available to them. This information should be conveyed in the Community Learning Agreement that is signed by the site supervisor, student, and Bonner Scholar director or coordinator.
- Bonner Scholars who do not return to the program in the fall will not receive the Summer Earnings. However, if a student decides to take a leave of absence after completing the previous summer's service requirement, he/she may receive the Summer Earnings upon his/her return to the program. Students who transfer to another Bonner college are eligible to receive their earnings at their new institution.
- \* *Note: The Class of 2004 will have two options in the summer of 2003: (a) they are entitled to \$1,300 in summer earnings if they complete 240 hours of service; or (b) they are entitled to \$1,500 in summer earnings if they complete 280 hours of service. Schools must notify the Foundation when they submit their summer Registrar's List which option each rising senior has selected. The Class of 2004 Bonner Scholars are eligible for these summer earnings regardless of how many summers of service they have already done.*

#### **4.4.3 Summer Living**

- *Beginning with the Class of 2005, up to \$2,000 will be available to students to cover summer living expenses.*
  - On paper, each Bonner Scholar will have a "Summer Living Account."
  - In the first summer they commit to doing service, Bonner Scholars will have \$1,000 available in their summer living account to draw upon. Provided they complete that first summer service requirement, any unused summer living funds from that first summer will remain in their account for their second summer of service.
  - In the second summer they commit to doing service, another \$1,000 will be added to their summer living account. This amount is added to the remaining balance, if any, that has been carried over in their summer living account from their first summer of service.
  - This summer living policy has been established to allow Bonner Scholars to budget their summer service support. Therefore, Bonner Scholars may choose to access less summer living funds in their first summer of service so that they have more available for their second summer of service. *For example, a Bonner Scholar may spend his first summer of service in the hometown and, therefore, might request only \$250 of summer living expenses, leaving \$750 in his "summer living account." As this Bonner Scholar plans his second summer of service, he can now develop his summer living budget knowing that he will have up to*

*\$1,750 available in his account to help cover expenses (\$750 that has carried over from his first summer of service and \$1,000 that was added for his second).*

- All students must submit their proposed summer living/travel budget to the Bonner Scholars Program director for approval. The director at each institution should establish a process for approving students' requests. This process should be included in the written guidelines provided to Bonner Scholars at the beginning of the year.
- A student who does not complete his/her summer service requirement during a particular summer should be asked to repay a portion of the summer living allocated to him/her, prorated on the basis of the actual number of hours completed. These funds will be reimbursed to the Bonner Foundation or the school's Bonner endowment (see Section 5.3.1 for a description of the reimbursement process).
- The Summer Living should be paid to the students according to a disbursement schedule determined by the program director and approved by the Foundation.
- *Note: Rising senior Bonner Scholars may apply for an additional \$500 from the Rising Senior Summer Enrichment Fund (see Section 4.4.9 for allocation guidelines).*
- *Note: The Class of 2004 are "grandfathered" under the old guidelines and, therefore, will be entitled to \$500 summer living funds in the summer of 2003. However, as rising seniors, they may apply for an additional \$500 from the Rising Senior Summer Enrichment Fund support (see Section 4.4.9 for allocation guidelines).*

#### **4.4.4 Loan Reduction Fund**

- Up to \$1,600 will be allocated to reduce each Bonner Scholar's total educational loan indebtedness at the time of graduation.
- To be eligible for the Loan Reduction Award, graduating Bonner Scholars must have met the following requirements:
  - Attended first-year orientation;
  - Attended cluster event;
  - Completed the school-year hourly service requirement every year in the program;
  - Participated in *two* full-time summer service opportunities (*one* full-time summer service for replacements who begin in their junior year);
  - Participated in a recommitment exercise at the end of second year in the program;
  - Completed first-year, midpoint, and graduating Student Impact Surveys;

- Participated in the Student Development Model;
  - Made a senior capstone “presentation of learning and service impact”;
  - Attended a senior exit interview with the director of the Bonner Program;
  - Graduated from the college where he/she was a Bonner Scholar.
- Individual schools have the option of adding additional requirements or waiving one or more of these requirements, with approval from the Bonner Foundation.
  - Students who graduate without educational loans will be allowed to use their loan reduction funds towards graduate school. This option must be used within seven years of graduation.
  - The Loan Reduction Fund should be disbursed through a college check to the lender or graduate school on behalf of the student.
  - For replacement Bonner Scholars, loan reduction will be calculated by subtracting \$125 per missed semester from the maximum of \$1600.
  - Bonner Scholars who take an extra semester or more to graduate will still be eligible for the Loan Reduction Fund, but not until they receive their diploma. For these students, the loan reduction funds will be included with the semester allocation that follows their actual date of graduation.

#### **4.4.5 Administrative Fund**

- \$350 (\$175 per semester) per Bonner Scholar is allocated for staffing and other costs related to the administration of the Bonner Scholars Program.
- In the fall semester, an additional \$50 is allocated per first-year Bonner Scholar to support the Bonner Cluster Event (see Section 2.9 for a description of the Bonner Cluster event).
- The Foundation does not require any official reporting on the use of administrative funds, but may on occasion survey the campuses to better understand the overall costs of the program.
- When a Bonner Scholar withdraws from the program, administrative funds are not required to be reimbursed.

#### **4.4.6 Community Fund**

- \$100 per Bonner Scholar (\$50 per semester) is allocated for the Bonner Community Fund account to support community service projects involving or initiated by Bonner Scholars.

- A committee of Bonner Scholars should be established to review student proposals for accessing Community Funds. This committee of Bonner Scholars should decide on the process and criteria for allocating the Community Funds. The Bonner Scholars Program directors should have final approval of Community Fund proposals, but they are not permitted to make their own proposals for the use of Community Funds.
- If necessary, the Community Fund should be held in an account separate from other Bonner Scholarship funds. Accurate records should be maintained, as well as appropriate security measures to ensure that these funds are used appropriately. A Community Fund report is required twice a year, including a detailed budget report (see Section 5.3.3 for directions for the Mid-Year and Year-End Community Fund Reports).
- Examples of *appropriate* uses of the Community Fund include:
  - covering the start-up expenses for a Bonner Scholar-designed service project;
  - purchasing books or other supplies for the students Bonner Scholars are tutoring;
  - paying summer camp tuition for kids tutored by Bonner Scholars;
  - training-related expenses, including travel and registration expenses for conferences and workshops (with a maximum training expense of no more than 25% of the total opening balance in any semester).
- Examples of *inappropriate* uses of the Community Fund include:
  - donations to agencies or projects where Bonner Scholars or other students from your institution are *not* directly involved;
  - travel expenses to and from service sites during the school year and the summer;
  - supplement to summer living funds for summer placements or internships;
  - food or drinks for Bonner Scholar meetings;
  - expenses related to an awards program;
  - expenses related to the general administration of the Bonner Scholars Program (travel, printing, phone, equipment, salaries).
- When a Bonner Scholar withdraws from the program, community fund money is not required to be reimbursed.

#### **4.4.7 Bonner Student Congress Travel Fund**

- Up to \$250 per trip per Bonner Student Congress representative is available to cover travel expenses to Bonner Congress meetings.
- Please submit your reimbursement requests for up to \$250 per Bonner Congress representative directly to the Bonner Foundation, accompanied by the receipts.

#### **4.4.8 First-Year Bonner Service Trip Funds**

- Up to \$250 per first-year Bonner Scholar is available to cover expenses related to meeting the required first-year service trip. An additional \$250 is available for each of two people (students or staff members) who attend in a supervisory capacity.

- Proposals to support your first-year Bonner Scholar service trip should be made no later than six (6) weeks before the trip to allow the Foundation time to review the proposal and process a check.
- Your First-Year Bonner Service Trip proposal should answer the questions below and take no more than two pages:
  - I. Description of Trip
    - Itinerary, including dates
    - Service Activity (i.e., what will students be doing on the trip?)
    - Mission of the trip (i.e., what issues/ topics will be examined and addressed?)
    - Description of Partner Organization(s)
    - Curriculum/ Preparation (briefly describe activities leading up to the trip)
  - II. Space for Bonner Scholars from Other Schools
    - Will there be space available for Bonners from other schools to participate? If yes, how many?
  - III. Proposed Budget (including travel, room, board, and other expenses)

#### **4.4.9 Rising Senior Summer Enrichment Fund**

- Rising senior Bonner Scholars may apply for an additional \$500 to support their summer service activities. These funds are in addition to their summer living award.
- To receive this additional support, rising seniors must submit a proposal requesting these funds. This proposal should be submitted to their Bonner director or coordinator, who will then forward it to the Bonner Foundation for final approval. These proposals must be received by the Foundation prior to the summer and in time for these funds to be allocated along with the Summer Allocation award.
  - The proposal form is available on the Bonner Foundation's website at [www.bonner.org/resources/guidelines.htm](http://www.bonner.org/resources/guidelines.htm).
  - If approved, these additional funds will be allocated in the Bonner Scholar's summer living award.

#### **4.4.10 Bonner Summer Service Placement in Local Campus Community**

- Campuses can apply for additional funds to help build local summer service placements for Bonner Scholars who want to stay in their college community. These projects should continue service projects or related initiatives that also operate during the school year.

- The maximum amount available for each campus each summer is determined by the number of enrolled Bonner Scholars based on a calculation of \$75 per student per year. For example, a school with 60 Bonner Scholars would be eligible for an additional \$4,500 (\$75 x 60) to help establish and support these summer service opportunities.
- These funds may be used to provide additional summer living or summer earnings to the participating students and/or to cover administrative costs associated with running the summer program.
- The maximum supplemental amount that an individual student engaged in your local summer service program can receive is \$1,500.
- The Bonner Scholars Program director must submit a formal request for these funds at least six (6) weeks prior to the summer in which the funds would be used. (Note: Bonner Scholar institutions with Bonner endowments must submit a formal request before these funds can be withdrawn from their endowments.)
- The proposal should answer the following questions:
  - I. Background: provide a brief description of your local Summer Service Program
  - II. Program Benefits: How will the summer service program enable student involvement in each of the following:
    - A year-round service program?
    - Preparing for the coming school year?
    - Enhanced student development activities based on the summer service opportunities being provided?
  - III. Budget: Provide a brief budget, including how many students will be involved.
- The allocation of these supplemental funds will be separate from the funds allocated in the summer allocation report.

## Section V: Reporting

### 5.1 Reporting Calendar

DUE DATE	REPORT TITLE	REPORT TYPE
<i>September 15<sup>th</sup> (at the beginning Fall semester)</i>		
	Fall Registrar's List	Enrollment
	Summer Service Program Report	Narrative
	Summer Reimbursement Report	Financial
	Summer Living Expense Report	Financial
<i>January 15<sup>th</sup> (beginning Spring semester)</i>		
	Spring Registrar's List	Enrollment
	Fall Reimbursement Report	Financial
	Mid-Year Community Fund Report	Financial
<i>June 1<sup>st</sup> (beginning Summer term)</i>		
	Summer Registrar's List	Enrollment
	Spring Reimbursement Report	Financial
<i>July 1<sup>st</sup></i>		
	Annual Report	Narrative
	Year-End Community Fund Report	Financial

- The Foundation's semester Bonner Scholarship allocations will be made only after all outstanding narrative and financial reports have also been received.
- Beginning with the implementation of the Bonner Web-Based Reporting System, some of the enrollment and financial reports described below will be generated by the web-based reporting system. Updated reporting guidelines will be made available when the web-based system is completed. In the meantime, please use the guidelines below for all reporting.

### 5.2 Enrollment Reports

#### 5.2.1 New Freshman Approval List

- Each year the list of prospective Bonner Scholars that you would like to accept into your program must first be approved by the Foundation before these students are notified of their acceptance into the program.
- The list should include the following information: first and last name, hometown and state, estimated family contribution (EFC), race, gender, and first generation college status.
- The Foundation's approval will be given to the director/coordinator by fax or email.

- See Section 1.2 for details on the Bonner Scholar selection criteria.

### 5.2.2 Semester Registrar's Lists

- A list of active and enrolled Bonner Scholars should be signed (or sealed) by your registrar using the format below and then submitted to the Foundation after the start of the semester (including the summer) so that each student's enrollment status can be confirmed in person.
- Allocation checks will be issued by the Foundation after the registrar's list has been received and confirmed by the Foundation. The allocation checks will be mailed to the president along with a cover letter and Allocation Report. Copies of the letter and Allocation Report will be sent to the financial aid director, controller, and Bonner Scholars director or coordinator.
  - *For institutions with the Bonner Scholar Endowments, allocation checks should not be disbursed from Bonner Endowments until a similar confirmation letter and Allocation Report has been received from the Foundation.*
- Please submit your Semester Registrar's List for actively enrolled Bonner Scholars using the following format:
  - At the top of each page, please include the college name, period covered, and semester report date.
  - *Each class per page* listed alphabetically and numbered, so that the total number on each page equals the number of students in that class. If the registrar cannot conform its report to this format, please produce one yourself, which can be signed.
  - A sample page of the Semester Registrar's List follows:

<p><b>Spring Semester Registrar's List</b>  <i>Submitted on January 15, 2003</i></p> <p style="text-align: center;">CLASS OF 2003</p> <ol style="list-style-type: none"> <li>1. Jane Doe</li> <li>2. Joe Smith</li> <li>3. Sam Spade (graduating, loan reduction \$1600)</li> <li>4. etc.....</li> </ol> <p style="text-align: center;">- page 1 -</p>
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- Students who do not graduate with their class (because they took a leave, for instance) should still remain in their original graduating class in any reports to the

Foundation, even if they are the only student left in that class. Therefore, in the lists you submit to the Foundation, please keep students in their original class year regardless of any leave they may have taken.

- Graduating Bonner Scholars should be included in the registrar's list for the semester that they will graduate. Next to their name on the registrar's list, please indicate the amount of loan reduction funds (up to \$1,600) due (see Section 4.4.4 for more information on Loan Reduction).
- Make sure that separate Change of Status Forms are completed for students who have withdrawn, gone on leave or semester-abroad programs and are not completing their service, or have returned from leave (see Section 5.2.3 for more details).

### **5.2.3 Change of Status Form**

- A Change of Status form should be completed and sent to the Foundation for any student who: (1) withdraws, (2) goes on or returns from leave, (3) enters into a semester abroad or exchange program and is not completing his/her service requirement, or (4) replaces another student.

## **5.3 Financial Reports**

The following series of financial reports required by the Foundation allow both the institution and the Foundation to monitor the Bonner Scholars Program's financial performance.

### **5.3.1 Bonner Scholarship Reimbursement Reports**

- Completed Reimbursement Reports should be submitted to the Foundation at the end of each semester and summer. The completed Reimbursement Report indicates the amount of Bonner Scholarship Funds allocated, expended, and the balance to be reimbursed for each student enrolled in the program for that time period.

*The Reimbursement Report is derived using the Allocation Report provided by the Foundation with each semester and summer's award letter. The expended and balance boxes are to be filled in and then submitted as the Reimbursement Report.*

- The process for completing the Reimbursement Reports is as follows:
  - At the beginning of each semester and summer, the Foundation uses the Registrar's List to generate a partially filled-in Allocation Report, which only contains figures for the amount of Bonner Scholarship funds allocated for each student active in the program for that time period. This Allocation Report is included with the award letter sent to the president, with copies sent to the financial aid director, controller, and Bonner Scholar director or coordinator.
  - At the end of the semester, the director or coordinator should use the Allocation Report that was sent at the beginning of the semester and fill in the expense and balance columns for those students with positive or negative balances. In

addition, the director/coordinator should calculate the total expenses and balances at the bottom of each column.

- This completed Reimbursement Report should be submitted to the Foundation at the beginning of the next semester along with the registrar's list and other reports due at that time.
- Finally, the Foundation will reconcile any discrepancies between the Foundation's and your institution's records. Once any discrepancies are resolved, if necessary the Foundation will send a formal letter to the president requesting the return of "unexpended" Bonner Scholarship funds to either the Foundation or the Bonner Endowment.

### **5.3.2 Summer Living Expense Fund Report**

- The status report on the Summer Living Fund is due at the beginning of the fall semester and should accompany the Summer Service Report and the Summer Reimbursement Report.
- The Summer Living Report should be in the form of a balance sheet showing the opening balance, the source of new funding (summer living funds for the Class of 2004 only), the uses and total expended, and the ending balance.
- *Note: this report will be phased out after Summer 2003 because the Class of 2004 is the last Bonner Scholar class for whom the summer living expense funds are pooled. At the end of Summer 2003, any balance remaining in this fund will be returned to the Foundation or the school's Bonner endowment.*

### **5.3.3 Community Fund Reports**

- The Mid-Year Community Fund report is due on January 15th at the beginning of spring semester. The Year-End Community Fund Report is due on July 1<sup>st</sup> along with the Annual Report.
- The Community Fund Report consists of two items:
  - a Community Fund Expense Report (see format below);
  - a brief description (2-4 sentences) on each of the projects or activities that received funding. We encourage you to attach other documents (i.e., reports, articles) that further describe the projects funded.
- The Community Fund Expense Reports should be submitted in the following format:

### Year-End Community Fund Report

*Submitted on July 1, 2003*

Opening Balance (from period ending December 31, 2002)	\$1,000.00
Sources of New Funding (Spring Semester 30 students x \$50)	<u>\$1,500.00</u>
<i>Total Available on January 1, 2003</i>	<i>\$2,500.00</i>
Uses	
Supplies for Westbook Elementary School	
After-School Tutoring Program	\$350.00
Fee for Fundraising Workshop Consultant	<u>\$500.00</u>
<i>Total Expended</i>	<i>\$850.00</i>
<i>Ending Balance on July 1, 2003</i>	<i>\$1,650.00</i>

## 5.4 Narrative Reports

### 5.4.1 Annual Report

- An Annual Report should be submitted to the Foundation by July 1<sup>st</sup> each year.
- The Annual Report should include the following:
  - a cover letter and table of contents (with the following sections):
    - A. Community Service Placements
      - a summary description of your community partnership activities.
      - a brief (1-2 sentence) description of each major school-year service site and the service being provided by the Bonner Scholars and other students.
    - B. First-Year Service Trip
      - a description of your first-year service trip.
      - a budget report showing total sources and expenses.
    - C. Training and Enrichment
      - a description of enrichment, training, and reflection activities especially as they relate to the four-year student development model.
      - a description of the Senior Bonner's Presentation of Learning.
    - D. Academic Links
      - a brief description of any service-learning or community-based research courses and projects underway on your campus.

E. Program Management

- an update on administrative areas such as staffing changes, student leadership, recruitment, selection, retention, academic counseling, school year and summer service placement process, career development, links between the Bonner Scholars Program and other campus-wide service activities and structures.

F. Program Plan

- an update on any progress towards addressing issues, concerns, or challenges reported in earlier reports.
  - a description of your action plan and priorities for the coming year.
- A copy of the Annual Report should be given to your president, dean of academic affairs, dean of student affairs, and all members of your Bonner Scholars Program's Selection and Advisory Committees.

**5.4.2 Summer Service Report**

- The Summer Service Report is due to the Foundation by September 15<sup>th</sup> prior to the disbursement of the fall allocation payment.
- The Summer Service Report should report on the summer service placements by Bonner Scholars and should briefly cover the following areas: A. list of placements, B. a review of overall strengths and weaknesses, C. a general summary of agency and student evaluations, and D. plans for future summer service projects and ways to improve the placement process and sites for next summer.