

# THE CHARLOTTE W. NEWCOMBE FOUNDATION

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## **Newcombe Scholarships for Students with Disabilities**

### **Program Policy**

*Updated December 2011*

#### **I. PURPOSE**

Newcombe Scholarships for Students with Disabilities support completion of degrees by students with disabilities who need financial assistance. The Newcombe Foundation provides these scholarships in partnership with selected colleges and universities that welcome enrollment by students with disabilities and are committed to their success.

The Foundation also helps college and university partners build endowments that strengthen their long-term capacity to sustain a Newcombe Scholarships program.

#### **II. CURRENT USE GRANTS**

##### **A. Institutional Eligibility**

Universities and colleges that enroll a substantial number of students with disabilities and provide supportive academic and counseling services for them may apply to the Newcombe Foundation for Current Use grants to be distributed as scholarships in the academic year immediately following the grant award. As appropriate to the institution, the application may be submitted by the institution's authorized fundraising foundation.

##### **B. Matching Funds**

As the Foundation's Trustees seek to conduct the Newcombe Scholarships programs in partnership with each funded institution, they strongly prefer that funded institutions supplement Current Use grant funds from the Foundation with an equal amount of matching funds from the institution or other sources that are dedicated to students who meet the Newcombe Scholarships eligibility standards (see II.E. below).

##### **C. Administration**

Each funded institution, through a designated office that provides services to students with disabilities and its financial aid office, is responsible for selecting Newcombe Scholarship recipients, administering scholarship funds and reporting to the Foundation.

All costs of administering Newcombe Scholarships must be borne by the university or college.

An interim report on selection of recipients and administration of scholarships is due in December and a complete annual report is required in June. Report forms and guidelines are provided well in advance of deadlines.

The Foundation welcomes and responds individually to acknowledgment letters from scholarship recipients.

##### **D. Eligible Expenses**

Newcombe Scholarships for Students with Disabilities funds are awarded in two complementary forms:

Newcombe Tuition Scholarships are intended to provide less than the full cost of tuition for the semester or year for students with disabilities who have documented financial need. Scholarship funds should be credited to the student's financial aid account and used to cover standard categories within "cost of attendance," specifically including tuition, education-related fees, academic textbooks, childcare, and other categories normally considered in the financial need analysis for all students.

Newcombe Support Scholarships are intended to help students address disability-related needs that lie beyond the institution's accommodation mandates and are not coverable by public disability agencies or other available financial resources. The overall goal is to provide targeted grants to individual students that, in the opinion of the professional staff that coordinates institutional accommodations for students with disabilities, will have a significant impact on the student's progress toward degree completion and realization of career goals. Such awards should provide less than the full cost of the item or service being provided. Authorized categories include:

- Assistive Technology. Support for institutional or student purchase of personal computing or communications hardware and software or other devices needed to address a student's documented need related to vision, hearing, mobility or learning disability. Unless the Newcombe Foundation staff grants specific approval, no more than half the cost of major items (\$1,000 or more) should be covered by Newcombe funds.
- Assistive Tutoring. Support for student purchase of assistive tutoring in particular subject areas where the student's disability suggests a likelihood of significant benefit from services beyond those provided within the institution's mandate.
- Internships. Support for student expenses for off-campus internship or work experience that relates to the student's course of study and enhances qualifications for future employment. On-campus internships may qualify if required by the severity of the student's disability.
- Other Disability-Related Expenses. Support for other documented disability-related expenses that will have a significant impact on the student's progress toward degree completion and realization of career goals but are not coverable by public disability agencies, the institution, or other available financial resources. Questions about the appropriateness of expenditures in this category should be referred to the Foundation's staff. Examples of approved expenses include:
  - Special medical or psychological services related to the student's disability.
  - Services and assessments required to update disability documentation (e.g., to qualify for accommodation on a Praxis or GRE exam).
  - Disability-related assistance to the conduct of particular academic study or research activities.
  - Special housing or transportation costs related to disability.

#### **E. Scholarship Eligibility Standards**

Newcombe Scholarships are designed to aid academically capable students with serious career goals. The clarity and attainability of the student's career goals and the student's commitment to them are factors that should be considered.

Newcombe Tuition Scholarships for Students With Disabilities must be need-based. The use of standard financial aid forms to establish basic economic circumstances is required, together with other information about the student's life circumstances that should be given

special consideration. Preference should be given to applicants who have exhausted other sources of funding.

Newcombe Support Scholarships for Students With Disabilities should also be need-based, unless that conflicts with institutional policy. Awards should be provided to candidates who request funding for disability-related costs that are not covered by public disability agencies, the institution, or other financial resources.

Candidates for each category of scholarships may be enrolled part-time or full-time. Among otherwise qualified candidates, preference for superior academic performance is encouraged. All candidates must maintain a grade point average of 2.50 or higher. Full-time employees of the institution are not eligible.

#### **F. Scholarship Selection**

Each funded institution is entrusted with determining the number and size of scholarships to address its students' needs most appropriately.

The Foundation recommends that a single Scholarship Selection Committee with three or more members choose Newcombe Scholarship recipients, and that the committee include staff representing financial aid and the designated service office, plus one or more faculty members. Experience suggests that use of such a committee enhances awareness on campus of the scholarship program and of the capabilities and special needs of students with disabilities.

Within institutionally established guidelines, the Scholarship Selection Committee is encouraged to consider the circumstances of each candidate in determining the size of individual scholarships.

#### **G. Foundation Payments**

The Newcombe Foundation pays Current Use Grants in two equal installments, in July and in December or January of each academic year.

### **III. ENDOWMENT CHALLENGE GRANTS**

#### **A. Institutional Eligibility**

The Foundation's Trustees strongly prefer that each college or university (or authorized institutional foundation) that applies for a Current Use Grant also request an Endowment Challenge Grant to establish or augment the institution's Newcombe-endowed fund.

#### **B. Matching Funds**

The Foundation's Trustees require that applicant institutions supplement the Foundation's Endowment Challenge Grant funds with matching funds from the institution or other sources.

#### **C. Endowment Management**

Endowment Challenge Grant funds and matching funds should be deposited in a segregated account within the institution's endowment.

Each Newcombe-endowed fund should be managed in a way that allows the corpus of the fund to grow, so that scholarship benefits will be preserved for a long period of time.

All appreciation (or depreciation) of the fund due to investment and all retained income should be attributed to the account. The Foundation strongly prefers that all costs of endowment management be borne by the university or college, and must be notified if the

institution or its foundation assesses any fee against its Newcombe-endowed Scholarship Fund for any purpose.

**D. Fund Size**

The Newcombe Foundation Trustees recognize and endorse institutional policies that require an endowed fund to reach a certain size before income may be awarded. Colleges and universities may retain fund income until their Newcombe-endowed fund has increased to an appropriate size before beginning to award scholarships from the Fund's income.

**E. Retention of Some Income**

The Newcombe Foundation Trustees also endorse institutional policies that limit the annual percentage of payout from endowments to less than total return, so that growth of principal may preserve the long-term efficacy of funds in fulfilling the purpose of donors.

**F. Continuity of Student Benefit**

The above notwithstanding, the Newcombe Foundation Trustees recognize that student needs do not diminish during periods in which the institution's endowed funds experience negative return. They encourage institutional policies that retain reasonable continuity of student benefit, including during times when the value of the endowed fund dips below the amount originally invested (i.e., when the fund is "under water").

**G. Foundation Payments**

The Newcombe Foundation matches funds that are raised into the Newcombe-endowed fund, up to and including the amount of the Endowment Challenge portion of the Newcombe grant. Institutional matching funds must be deposited within the academic year for which the grant was awarded. The Newcombe Foundation will process payment of all challenge grants in the middle and the end of the academic year, after Newcombe staff receives verification that the matching funds have been deposited into the Newcombe-endowed fund.

**H. Intended Recipients**

The Newcombe Foundation Trustees require that income received on Newcombe-endowed funds be administered in the same way and for the same purposes as Current Use Grants with respect to eligible expenses, selection process and selection criteria (see I. above).

**I. Fund Name**

The endowed funds created by the Foundation's matching challenge grants should be named for Mrs. Newcombe, i.e., The Charlotte W. Newcombe Scholarship Fund or The Newcombe Endowed Scholarship Fund. If special circumstances exist that require some other nomenclature, the Newcombe Foundation should be contacted for approval.

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