

CSU Channel Islands Foundation

Scholarship Establishment Information Sheet

Fund Name: _____

Established by: _____

Contact Name: _____

Address: _____

Phone: _____ Fax: _____ E-mail: _____

Date Established: _____ Giving mechanism: _____

(check, cash, other)

Initial Gift: _____ Total Pledge: _____ (if applicable)

How pledge to be fulfilled: _____

Date pledge expected to be complete: _____

Type of fund:	One-Time Gift	Annual Scholarship*	Endowment**
		(funding to be provided annually)	(\$25,000 minimum)

* Please note: Named annual scholarships are accepted on a case-by-case basis. The name of the scholarship must be approved by the CSUCI Foundation and may not be recognized with the same significance as named endowed scholarships. Annual scholarship gifts of \$10,000 or more will be charged 2% of the gift amount at the time the gift is made to help strengthen the development program and partially defray administrative costs.

** Endowment funds will be invested according to the CSUCI Foundation Investment Policy as permanently restricted endowment funds. The minimum total-return objective for these funds shall be the Higher Education Price Index plus 5%. For these funds, total return, not principal, may be expended in accordance with explicit donor-imposed stipulations per the terms of the gift agreement. A copy of the CSUCI Foundation Investment Policy will be provided to all endowment fund donors.

Additionally, in order to strengthen the development program and partially defray administrative costs, this gift is subject to the terms of the CSUCI Foundation Policy on Charging Administrative Fees on gifts to the Foundation.

Scholarship Criteria:

What involvement (if any) does donor wish to have with recipients?

My (our) signature(s) on this document signifies my (our) understanding that the above described scholarship fund has been established at CSU Channel Islands Foundation and will be managed according to my (our) instructions.***

_____ (date)

_____ (date)

_____ (date)

Marti DeLaO, C.F.R.E., Director of Development, Donor Relations/Annual Fund

*** If in the judgment of CSU Channel Islands Foundation it has become, or is likely to become impossible or impracticable to accomplish the purposes of the fund, the University at its discretion may amend the restrictions of the fund in such manner as the University will most effectively accomplish the donors' objectives.

Please return completed form to:
 CSU Channel Islands
 Office of Advancement
 Attn: Dianne Wei
 One University Drive
 Camarillo, CA 93012

 (805) 437-8420 phone
 Dianne.wei@csuci.edu