



San Diego Chapter Scholarship Policy

Our scholarship policy was developed in 1998 and has been revised over the years to meet the chapter's needs.

Purpose of Scholarship Program

- Develop future of profession
- Help students financially
- Public relations/name recognition for CalCPA
- Foster student memberships and eventual licensed members

Eligible Recipients

Eligible scholarship recipients include undergraduate upper division or graduate students at an accredited university or junior college within San Diego County who are enrolled at least half time in a university program leading to employment within the accounting profession.

Application

Each scholarship applicant must complete an application that includes, at a minimum, the information requested on the attached [sample application \(PDF\)](#), and submit the completed application to the committee on or before the deadline specified below. University of San Diego, San Diego State University, California State University San Marcos and University of California San Diego generally provide applications for their students. Applicants should contact their university's accounting program.

Selection for Chapter Academic Scholarships

Students will be accepted for Chapter Academic Scholarships based upon the following criteria as reflected in the scholarship application:

1. The student's interest in the accounting profession;
2. The student's potential for succeeding in the accounting profession;
3. The potential for informing students in general about CalCPA and for broadening the chapter's sphere of influence among people entering the accounting profession.

Selection for Need-based Scholarships

Students will be accepted for need-based scholarships (generally \$2,000 per scholarship) on a case-by-case basis. Need-based scholarships are intended for students with a compelling need for financial aid *beyond* that of students who normally apply for Chapter Academic Scholarships. Examples of factors that indicate a compelling need for financial aid include:

1. The student is receiving little or no financial support from his or her spouse, parents or other family members.
2. The student is supporting other family members, such as a child.

3. The student is experiencing an unusually difficult financial situation beyond his or her control.

Due Date

Completed scholarship applications must be returned to the committee chair on or before Feb. 28.

Scholarship Amounts

Scholarships are based on the above stated criteria and the chapter has approved the following levels:

\$4,500	<i>Chapter Academic Scholarships</i> allocated to USD: amounts of individual scholarships determined by school
\$4,500	<i>Chapter Academic Scholarships</i> allocated to SDSU: amounts of individual scholarships determined by school
\$4,500	<i>Chapter Academic Scholarships</i> allocated to CSUSM: amounts of individual scholarships determined by school
\$2,700	<i>Chapter Academic Scholarships</i> allocated to UCSD: amounts of individual scholarships determined by CalCPA
\$3,000	<i>Chapter Academic Scholarships</i> allocated to public WASC accredited junior colleges: \$500 per person
\$2,000	<i>Chapter Academic Scholarships</i> allocated to private WASC accredited schools: \$500 per person
\$2,000	<i>Need-based Scholarships</i> , per person

USD, SDSU, CSUSM and UCSD students apply directly to the school's accounting program, which then matches applicants with available scholarships from all sources for the purpose of giving a scholarship to every applicant who qualifies. A representative from each school sends the recommendations of which students should get scholarships and the amounts (which add up to the total allotted to the school) to the scholarship committee chair, Tom Dalton. The chair then submits the scholarship recommendations to the CalCPA San Diego Chapter board for its approval by vote, usually in March.

Presentation of Awards

The universities announce scholarships in April or May. CalCPA mails scholarship checks to the students in May. . Recipients are recognized at the San Diego Chapter Installation in early May.

Scholarship and Grant Awards

The committee will review special project grants requested for educational purposes and make recommendations to the chapter board on a case-by-case basis.

Questions

Questions about the chapter's scholarship policy can be directed to the committee chair Tom Dalton at dalton@sandiego.edu.

