

ORANGE COUNTY CHAPTER OF CALIFORNIA SOCIETY OF ENROLLED AGENTS

STANDARD OPERATING PROCEDURES - SCHOLARSHIP PROGRAM

I. POLICY

1. It is the policy of the Orange County Chapter to establish, maintain, and administer a Scholarship Program.

II. PURPOSE

1. There is a three-fold purpose to the Scholarship Program of the Orange County Chapter (OCEA) of the California Society of Enrolled Agents (CSEA).
 1. A. The first shall be to fully support the Scholarship program of the CSEA.
 2. B. The second shall be to further the business and career goals of worthy recipients and to encourage a career choice as Enrolled Agents by providing financial assistance in the payment of tuition and course material at the SEE class conducted annually by OCEA.
 3. C. The third shall be to support the National Association of Enrolled Agents (NAEA) and its promotion of the National Tax Practice Institute (NTPI) and the National Tax Education Institute (NTEI).

III. APPLICATION

1. This policy shall apply as follows:
 1. To all candidates throughout the State of California when approved by OCEA and submitted to the CSEA Scholarship Committee.
 2. To all candidates in the Southern California area who aspire to become Enrolled Agents.
 3. To all Enrolled Agents, certified public accountants, and attorneys throughout the United States when approved by NAEA.

IV. ADMINISTRATIVE GUIDELINES

- A. Eligibility requirements
 1. Applicants for the CSEA Scholarship Program shall meet the eligibility requirements set out in the CSEA policies and procedures.
 2. Applicants for the OCEA Scholarship Program shall be current or potential tax practitioners who are not Enrolled Agents (EA), Certified Public Accountants (CPA), or Tax Attorneys.
 3. Applicants for the NAEA Scholarship Program shall meet the eligibility requirements set out in the NAEA policies and procedures.

B. Scholarship Applications

1. Applicants for the CSEA Scholarship Program shall complete the prescribed Scholarship Application Form provided by CSEA and available from the OCEA Scholarship Committee.
2. Applicants for the OCEA Scholarship Program shall complete the appropriate OCEA Scholarship Application Form. Currently OCEA uses the same form as CSEA and it is available from the Scholarship Committee.
3. Applicants for the NTPI and the NTEI Scholarship Programs shall complete the prescribed Scholarship Application Form provided by NAEA and available from the OCEA Scholarship Committee.

C. Number of Scholarships Awarded

1. As the CSEA Scholarship Program does not limit to each Chapter the number of scholarships awarded per year, OCEA shall make a selection of as many candidates from among the applicants for the CSEA Scholarship Program as appropriate.
2. The number of scholarships awarded by OCEA shall be based on the number of deserving candidates identified by the OCEA Scholarship Committee and recommended to the OCEA Board of Directors.
3. The NTPI and NTEI Scholarship Program candidates shall be selected by the NAEA according to their rules of selection.

D. Chapter Procedures

1. The selection of applicants shall begin as early as possible in the fiscal year.
2. To locate qualified applicants for the CSEA Scholarship, the OCEA Scholarship Committee shall canvass primarily current OCEA members for recommendations from among their respective staff members, relatives, friends, or business clients or acquaintances.
3. To locate qualified applicants for the OCEA Scholarship Program, the OCEA Scholarship Committee shall canvass primarily current OCEA members for recommendations from among their respective staff members, relatives, friends, or business acquaintances who are in tax practice but who are not EA's, CPA's, or Tax Attorneys.
4. It shall be the responsibility of OCEA to make sure that applicants for the CSEA Scholarship Program meet the eligibility requirements of that program, and that the information compiled is both complete and accurate.

5. Applications for the CSEA Scholarship Program shall include:
 - a. Biographical statement.
 - b. Budget for coming school year.
 - c. At least two letters of recommendation.
 - d. Copy of school transcript or last year's report cards, if currently enrolled.
6. Applications for the OCEA Scholarship Program shall include:
 - a. Statement of Biographical Background.
 - b. Tax Experience.
 - c. Long-Term Goals.
7. Applications for the NAEA Scholarships shall include:
 - a. Two letters of recommendation.
 - b. One typed letter per the guidelines on the NAEA letter accompanying the application.
8. Applications for the CSEA Scholarship Program shall be submitted to the OCEA Scholarship Committee no later than November 30 or as stated on the CSEA Scholarship Application.
9. Applications for the NAEA Scholarship must be submitted to the NAEA no later than December 15 or as stated on the NAEA Scholarship Application.
10. The OCEA Scholarship Committee shall make its selection of the Chapter nominee based on established criteria and personal interviews, it shall then make its recommendation to the OCEA Board of Directors at the BOD meeting the month prior to the CSEA deadline. The Chapter nomination shall be submitted to the CSEA Scholarship Committee by the due date.
11. Applications of the OCEA Scholarship Program shall be submitted to the OCEA Scholarship Committee at the same time as the CSEA Applications.
12. The Scholarship Committee shall make its selection of worthy candidates based on established criteria and personal interviews. It shall then make its recommendations to the Board of Directors in enough time to meet all the application deadlines.
13. An individual meeting all eligibility requirements may submit applications for both the CSEA and the OCEA Scholarship Programs. However, if the individual shall be awarded a scholarship by the CSEA, this same individual shall not be eligible for the OCEA scholarship the same year.

14. The President of OCEA shall notify all successful applicants of their respective awards in time for the June general membership meeting, to which they will be invited as guests of OCEA. The winner of the CSEA Scholarship shall receive the award at the Annual Convention.

Amended 8/21/2001