

**Monterey Foundation**  
**Student Accountability Plan**  
**Student Name – school semester**

The Monterey Foundation (Foundation) has committed to help with educational finances for **Student Name** (student) for the **FALL 2021** semester at **institution name**. As part of that commitment, there are specific targets and goals that must be met by the student to sustain the Foundation’s commitment semester to semester, and beyond. Those are outlined in this **Student Accountability Plan** (SAP).

1. At the end of this semester, the student is required to submit a **written report** to the Board summarizing their activities and achievements during the just completed academic period. The report must be submitted **within 20 days** of the end of the semester, and sooner if possible. That report should provide detailed results for the SAP targets listed below, as well as any other significant information.
2. During the semester, the student must **maintain regular contact by email and phone** with the Board, and representatives of the Board may visit with the student periodically to assess progress. Minimally - contact should be initiated by the student in **designated months/week** but can be done more often if desired.
3. All students are expected to **meet the ongoing continuous enrollment criteria** of the university, including attendance and other guidelines.
4. In addition, it is the Foundation’s desire that **the student should be involved in campus life** and participate in more than just academics. Athletics, extracurricular activities, social activities, and so on are important to student development.

Each SAP is unique and may change from semester to semester. This **FALL 2021** SAP relates to the specific targets listed below, as well as continued contact & communications between the student and the Foundation board.

- Maintain continuous enrollment in the institution
- Maintain a 3.0 GPA for the semester
- Provide at least \$1,000 in Work/Study credits or personal payments for the semester
- Participate in at least ten (10) hours of community service documented and tracked by student.
- Call or meet (engage) with board member contact name at least *2 times* during the semester

**As the student seeks funding assistance for the next semester, they should update the original funding application information they sent to the Board for this semester.** That update should provide current academic plans as well as current financial information and should be submitted as soon as practical.

Discussed with Student by: \_\_\_\_\_ Date: \_\_\_\_\_

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Note: Students who do not reach these SAP requirements do not qualify for further awards from the Foundation unless there are extenuating circumstances.

A student deemed ineligible for assistance based on the SAP requirements can submit a written appeal explaining any special circumstances to the Foundation. In the appeal, the student must include why they failed to make meet SAP requirements, and what may have changed in the student's situation that will allow them to demonstrate successful progress at the next evaluation.

Students who do meet these SAP requirements but who are clearly not performing satisfactorily are interviewed by Board representatives to assess the reasons for their under-performance, and to agree to steps to remedy the situation. Such candidates are carefully reviewed if they apply for repeat funding to continue their studies, and may lose that funding, based solely at the discretion of the Foundation.