



SAN DIEGO GEOLOGICAL SOCIETY, INC.

A public benefit 501(c)3 nonprofit educational corporation
Doing Business As (DBA) San Diego Association of Geologists (SDAG)

CHARTER



GENERAL SCHOLARSHIP FUND



**FUNDING COSTS THAT SUPPORT UNDERGRADUATE AND GRADUATE
GEOSCIENCE DEGREE RESEARCH**

THE PURPOSE OF SDGS ORGANIZATION'S FUND CHARTER

A San Diego Geological Society, Inc (SDGS) Fund Charter is a document adopted by the Organization's Board of Directors (Board). The Charter describes (as applicable):

- the history of a fund,
- donor intent,
- the purposes for which the fund may and may not be used,
- the Board's goals for the fund,
- administrative operating criteria, and
- financial operating criteria

A Fund Charter demonstrates the Board's commitment to prudent management of the Organization's resources and compliance with applicable accounting and legal standards. Within the framework of SDGS governance, a Fund Charter is a policy document that may be amended or interpreted by the Board through a simple majority vote. A Fund Charter may refer to other documents that further describe the history, nature, and operations of a fund. Formal resolutions and motions of the Board that are of historical significance and apply to this Fund Charter are attached as Appendix Four.

This Charter for the General Scholarship Fund of the SDGS Organization was duly adopted by the Board of Directors of the SDGS on August 21, 2026.

By:

signed 08/21/26 by
Diane Murbach - SDGS Secretary

FUND CHARTER GENERAL SCHOLARSHIP FUND

PURPOSE AND SCOPE

The San Diego Geological Society, Inc (SDGS) Organization's General Scholarship Fund awarded funds before the creation of the non-profit on December 22, 2008, during the years between 1971 and 2008, as the San Diego Association of Geologists (SDAG). The purpose is to fully or partially reimburse costs of undergraduate and graduate students performing geologic research in geoscience degrees.

A primary function of SDAG is to support academic opportunities in geology and related sciences. The by-laws of the San Diego Geological Society (SDGS dba SDAG) specify the support of academic opportunity ranging from elementary through graduate levels. The SDAG scholarship program has supported academic research in higher education by awarding scholarships annually to students from two-year and four-year undergraduate and master's level programs. Current programs supported by the SDGS Organization General Fund include the San Diego Association of Geologists, scholarships and grants through this General Scholarship Fund.

Initial funding was provided by sponsors and income from publications. Once funded, scholarships are provided as funds allow.

The purpose and scope of the SDGS General Scholarship Fund, formalized by this Fund Charter, approved by the Board in 2026, are as follows:

The purpose of the Fund is to provide scholarships on a yearly basis, when funds are available, to degree-seeking undergraduate and graduate geoscience students performing geologic research in the geosciences, utilizing both principal and earnings. Awards are made based on a Letter of Nomination from the student's advisor addressing relevant geoscience courses, academic performance in coursework and research, and the outstanding nature of the research, along with a Research Abstract that includes the specific research question, significance of the study, the study goals, methods used in the study, key results, interpretations, and conclusions. The student should also describe the extent of their own fieldwork and explain how the work relates to geoscience research. Did the student perform the sampling, fieldwork, lab work and research, or rely on someone else's work for data acquisition? Selected recipients are expected to present their research at a spring SDAG meeting.

The Board finds that the General Scholarship Fund Purpose and Scope made a part of this Fund Charter are consistent with the Organization's mission and authority. The Board believes that the General Scholarship Fund serves a valid need, supporting students advancing geology in the greater San Diego, California area, that will advance scientific knowledge in the profession of geology. In adopting this Fund Charter by motion on August 21, 2026, the SDGS Board accepts the purpose and scope stated above.

Additional information is provided in the attached appendices.

Appendix One	Gift Instrument
Appendix Two	Organization's Information
Appendix Three	Scholarship Recipients
Appendix Four	Board Resolutions and Motions

FUND MANAGEMENT AND DONATIONS

The fund management will be in accordance with the current SDGS Fund Management Policy and SDGS Investment Policy, and subsequent updates. Donations accepted will be in accordance with the current SDGS Gift Acceptance Policy and subsequent updates.

Fund distribution will be in accordance with the Gift Instrument in Appendix One.

FUND ADMINISTRATION AND OPERATION

General Conditions

Scholarships from the SDGS General Scholarship Fund are intended to support costs for a scholarship program for undergraduate and graduate geoscience students.

Scholarships from the General Scholarship Fund may be used by recipients to support the direct costs to aid the degree-seeking students studies.

The definition of a "scholarship," found in Section 1.117-3 of the Treasury Regulations, generally means "an amount paid or allowed to, or for the benefit of, a student, whether an undergraduate or a graduate, to aid such individual in pursuing his studies."

Consistent with the SDGS Organization's status as a 501(c)(3) public charitable and educational organization under the Internal Revenue Code, scholarships from the General Scholarship Fund are true charitable awards intended to aid students in pursuing their geoscience studies and are not provided in exchange for any services rendered to the Organization. Accordingly, the Organization will not issue Forms 1099-NEC or 1099-MISC for any scholarships or other charitable grants awarded to individuals. In addition, the Organization will not award scholarships to support any publications, materials, or activities that constitute lobbying, political campaign intervention, or attempts to influence legislation or elections.

Applicant Conditions

In applying for a scholarship from the SDGS Organization, the scholarship applicant agrees to:

- Use the funds received from the SDGS directly for the proposed use;
- Use the funds in accordance with applicable law and regulation;
- Avoid activities in the use of the funds that would jeopardize the SDGS Organization's tax-exempt status;

- Track the receipt and expenditure of scholarship funds to determine your responsibility for any taxable reporting;
- If selected for the award, you are expected to present your research's final report at a spring SDAG meeting in the year following the award. This presentation is intended to further the educational and scientific mission of the Organization and is not compensation for services;
- Acknowledge the financial support as from "SDAG" in any publications and presentations that make use of the work supported by the scholarship;
- Provide the Organization with one paper copy or offprint of any publication that incorporates work supported by the scholarship, and with references to any electronic publication that incorporates work supported by the scholarship; and
- Scholarships are not payments for services. The recipient is responsible for tracking how the funds are actually used and reporting any taxable portion on their tax returns. Recipients should consult their tax advisors regarding taxability of the scholarship.

Donor Intent

Recognizing donor intent, the establishing gift to the SDGS Organization is classified as an asset without donor restriction. Additional gifts from any donor and any fund transfer from any SDGS Organization program or support fund will be classified as an asset without donor restriction. Earnings from contributions are classified as an asset without donor restriction. See the Gift Instrument in Appendix One for additional information.

Scholarship Fund Operational Protocols

1. The Board contemplates funding scholarships that can be carried to completion within one year of initiation unless a specific exception is approved by the Board.
2. Each year the Board will determine the amount of funds available at the mid-year July Board meeting for award at the December SDAG meeting.
3. Scholarship applications will be reviewed by the Scholarship Committee, which will make a recommendation to the Board. The Board shall approve the appointment of the Scholarship Committee.
4. Scholarships will be approved by a motion made at a Board meeting.
5. Disbursements from the General Scholarship Fund will be made payable to the student.

Scholarships will be awarded on an objective and nondiscriminatory basis. No awards will be made to members of the SDGS Board of Directors, officers, substantial contributors, or their immediate family members. The Scholarship Committee will evaluate applications based on the criteria set forth in this Charter, and the Board will retain final approval authority. The Organization will maintain records sufficient to substantiate that awards were used for their intended educational purposes. Accounting terminology used in this Fund Charter is intended to conform to Accounting Standards Codification (ASC).

SCHEDULE FOR REVIEW OF CHARTER

The Board may maintain this Charter unchanged or make revisions at any time. This fund Charter shall be reviewed by the Board at least every five years, on a schedule to be determined by the Board.

APPENDIX ONE GIFT INSTRUMENT

SDGS Board's goal for the use of the Fund

The Scholarship Fund is intended to pay direct costs for degree-seeking undergraduate and graduate geoscience students performing geologic research in the geosciences. Direct costs include tuition, fees, books, supplies, equipment, room and board, travel, and research.

SDGS Board's goal regarding the initial fund corpus

The Fund is permitted to spend down the funds to meet the goals of the Fund and is not required to maintain a specific balance.

The original fund corpus is unrestricted.

SDGS Board's goal regarding additional donations and income.

Additional donations and income to the Fund are unrestricted.

Maximum individual scholarship or maximum total award

There are no restrictions to a maximum individual scholarship award or maximum total award for the year. The intent is to provide flexibility to adjust the awards based on the actual costs awardees are incurring and the funds available that year.

APPENDIX TWO ORGANIZATION'S INFORMATION

In 2008 a group of the SDAG past presidents formed a Board of Directors and created a non-profit corporation (Dave Bloom, Diane Murbach, Greg Cranham, Monte Murbach, Lowell Lindsay, Mike Hart). This new organization (SDGS) was created as a 501(c)(3) non-profit Corporation. Approvals included: SDGS Articles of Incorporation, a California Public Benefit Corporation; Bylaws; Internal Revenue Service Employer Identification Number 26-3864747 tax exempt status and Public Charity Status. The organizations contributions are deductible under section 170, and the Organization is qualified to receive tax deductible bequests, devises, transfers or gifts under sections 2055, 2106 or 2522 of the IRS code. The SDGS Board approved SDAG officers as a "committee" on February 11, 2009. On February 7, 2022 SDGS recorded a fictitious business name statement, doing business as (dba) SDAG.

The benefits of a 501(c)(3) Nonprofit Corporation Status are: Profits are exempt from corporate income tax and qualify for other tax exemptions; Proper management of our publication sales and sales tax reporting (Field Trip Guide Books; Short Courses such as the Landslide Training and the Seismic Course); Individuals can make tax deductible contributions (Sponsors or other donations); Can obtain better rates on event liability insurance (Picnic Park events); Personal liability protection for officers and organization as a whole (Field Trips/One Stop Wonders); Allows a legal structure that helps to expand our activities (Educational trips); and Tax-exempt status is required for many public and private grants (Future opportunities). SDGS has a broader "public" scope and reflects the history of what SDAG has stood for since being created in 1971, i.e., publish geological books, support students with scholarships, lead field trips, and organize other activities of a public and educational nature. SDGS is currently governed by a six-member Board of Directors elected to 2-year terms, three in even years and three in odd years. The Bylaws allow between four and seven Directors.

The SDGS Mission Statement was created September 24, 2008 and guides SDGS to provide a platform for all interested in the exchange of ideas about earth science. The organizations activities primarily consist of providing continuing education opportunities for earth science professionals and the general public through monthly meetings featuring speakers on regional geologic topics. The organization promotes and organizes frequent educational field trips within southern California. The organization will also support and fund academic scholarships from elementary through graduate levels. In addition, the organization will support professional and academic research, and publish field trip guidebooks and other books on regional geology and natural history. We will also promote outreach and education to the general public, partnering with other organizations to involve the earth sciences. Funding sources for these activities include membership dues, proceeds from publication sales, donations from corporate and individual sponsors, operating short courses and obtaining grants.

APPENDIX THREE SCHOLARSHIP RECIPIENTS

The SDAG General Scholarship Recipients table below provides the current knowledge for awardees presented by year, amount, recipient name, university/degree, title of the recipient abstract with any other historic data known at the time of this version.

University acronyms: University of California, San Diego/Scripps Institution of Oceanography (UCSD/SIO); San Diego State University (SDSU); University of San Diego (USD); Southwestern College (SWC).

This SDAG Scholarship Recipient table is not complete. Research continues to fill in historic data as no comprehensive list was ever maintained by SDAG. This table can be updated in this General Charter without SDGS Board of Directors action. This version is dated August 21, 2026.

SDAG GENERAL SCHOLARSHIP RECIPIENTS				
Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
1971-2003				Awardees and amounts were announced at SDAG meetings.
2004		Charles Lipka	SDSU (Graduate)	<i>Depositional Simulation of Aquifer Heterogeneity and Anisotropy.</i>
2004		Angela K. Hotz	USD (Graduate)	<i>Water and sediment quality in Bahia Magdalena, Baja California Sur, Mexico.</i>
2006		Jamie Ward	USD (Graduate)	<i>Cadium, Corals, and the Kona Coast of Hawaii</i> (Spoke at April 19, 2006 SDAG meeting)
2007		Ruben Campos	Centro de Investigación Científica y de Educación Superior (CICESE) Ph.D. candidate	<i>Simulation and Optimization of the Guadalupe Valley Aquifer, Baja California</i> (Spoke at March 21, 2007 SDAG meeting)
2008		Melanie Biggs	SDSU (Graduate)	<i>The Lucky 5 and Oriflamme Canyon Plutons: Key Temporal Markers In The Structural And Tectonic Evolution Of The Peninsular Ranges Batholith, Se California</i> (Spoke at March 19, 2008 SDAG meeting)
2008		Rumi Takedatsu	SDSU (Undergrad)	<i>Determination Of Crustal Thickness In The Caucasus And Caspian Region Using Receiver Functions</i> (Spoke at March 19, 2008 SDAG meeting)

SDAG GENERAL SCHOLARSHIP RECIPIENTS				
Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
2009	\$500	Jared Warner		<i>Biotic Response of Ostracodes to the Middle Eocene Climatic Optimum (MECO) in the Southern Indian Ocean</i> (Spoke at March 18, 2009 SDAG meeting)
2010-Present				Awardees and amounts are now managed by the new SDGS 501c3 and announced at December SDAG meetings. A new SDGS sponsorship program begins for allowing tax deductible donations.
2010	\$500	Megan Kolupski	USD (Graduate)	<i>The Land-Sea Connection: Sedimentation and Resuspension on Coral Reefs in Coastal Bays on St. John, USVI</i> (June 16, 2010 Board Minutes. Spoke at October 2010 SDAG meeting)
2010	\$500	Steve Werner	SDSU (Undergrad)	<i>Geochemistry and Petrogenesis of mid-Miocene volcanoes from the ancestral cascades of northeastern California</i> (November 10, 2010 Board Minutes. Spoke at April 2011 SDAG meeting)
2010	\$500	Gayatri Marliyani	SDSU (Graduate)	<i>Subsurface Characterization of Mystic Lake Paleoseismic Site on the Claremont Fault using CPT Data: Evidence for Straightening of the Northern San Jacinto Fault, California</i> (November 10, 2010 Board Minutes. Spoke at April 2011 SDAG meeting)
2011	\$500	Mike Buga	SDSU (Graduate)	<i>San Jacinto Fault Work Update – Clark Lake And Hog Lake</i> (Spoke at February 2012 SDAG meeting)
2011	\$500	Taylor Carrasco	SDSU (Undergrad)	<i>Fracture Morphology and Orientation Within Saprock and Corestone: Implications for Ground Shaking During Earthquakes on the Elsinore and San Jacinto Faults</i> (Spoke at April 2012 SDAG meeting)
2012	\$1,000	Will Lee	USD (Undergrad)	<i>Bioavailability and Natural Pollution of Heavy Metals Bahia de Magdalena, Baja California, Mexico</i> (Spoke at April 2013 SDAG meeting)
2012	\$1,000	Bobby Harrington	USD (Graduate)	<i>Ridge to reef assessment of metal concentration and mineralogy in</i>

SDAG GENERAL SCHOLARSHIP RECIPIENTS				
Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
				<i>rocks and sediments on St. John, U.S. Virgin Islands</i> (Spoke at April 2013 SDAG meeting)
2012	\$1,000	Erik Haaker	SDSU (Graduate)	<i>Neotectonic Uplift of Coastal Marine Terraces, San Diego and Orange Counties, CA: Testing the Oceanside Blind Thrust Model</i> (Spoke at April 2013 SDAG meeting)
2013				SDGS Approves Protocols for managing Scholarships. Dr. Anne Sturz is selected as the Scholarship Committee Chair.
2013	\$1,000	Brian Rockwell	SDSU (Undergrad)	<i>Non-central principal component analysis of geochemical data and clay mineralogy from the San Jacinto fault in southern California: a new method to assess alteration intensity in fault zones</i>
2013	\$1,000	Luke Weidman	SDSU (Undergrad)	<i>Landslide Hazard Analysis and Mitigation for Sepanjang Village, Central Java Indonesia</i>
2013	\$1,000	Cornelius Harris	USD (Undergrad)	<i>Naturally Occurring Concentrations of Seventeen Metals in the Bay Point Formation, San Diego, California</i>
2014	\$1,000	Bridget Borce	SDSU (Undergraduate)	<i>Development of florissant fossil beds national monument geologic guide</i>
2014	\$1,000	Ashley Heath	SDSU (Graduate)	<i>The effects of illuviation on the petrology and chemistry of tonalitic saprock</i>
2014	\$1,000	Tyler Barnes	USD (Undergraduate)	<i>Monitoring Turbidity in Bays with coral reefs: St. John, US Virgin Islands</i>
2014	\$1,000	Clifford Hoang	UCSD/SIO (Undergraduate)	<i>Small-scale sea surface salinity variability in the middle Atlantic bight</i>
2014	\$1,000	Xiomara Rosenblat-Dailey	SWC	<i>Taxonomy of Eocene chondrichthyans</i>
2015	\$1,000	Kaitlin Wessel	SDSU (Graduate)	<i>500 Year Rupture History of the Imperial Fault at the International Border Through Analysis of Faulted Lake Cahuilla Sediments, Carbon-14 data and Climate Data</i>
2015	\$1,000	Janae Fried	SDSU (Undergraduate)	<i>San Diego River watershed relationship of total dissolved solids and specific anions</i>

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Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
2015	\$1,000	Michelle Zill	UCSD/SIO (Graduate)	<i>Evolution of pelagic fish production across the Oligocene/Eocene boundary</i>
2016	\$1,000	Luke Weidman	SDSU (Graduate)	<i>San Diego Earthquake Hazard: Geotechnical Synthesis</i>
2016	\$1,000	Stephen Campbell	USD (Graduate)	<i>Watershed Runoff and Sediment Resuspension: Factors Affecting Turbidity and Sedimentation in Bays with Coral Reefs, St. John, USVI</i>
2016	\$1,000	Nick Lau	UCSD/SIO (Undergraduate)	<i>New Geodetic Measurements of Crustal Deformation in Southern California from the Sentinel-1 Mission</i>
2016	\$1,000	Carlos Anguiano	UCSD/SIO (Undergraduate)	<i>Archaeointensity Study on Armenian Archaeological Pottery Sherds from ~6000-1000 BCE</i>
2017	\$1,000	Ariella Goldstein	SDSU (Undergraduate)	<i>Unraveling the structural geometry in the sub surface based on a technique called SCAT</i>
2017	\$1,000	Allison Kubo	UCSD/SIO (Undergrad)	<i>Multiphase Modeling of confined pyroclastic density currents and the effect on entrainment and mobility</i>
2017	\$1,000	Alexander Laws	SDSU (Graduate)	<i>Palaeogeographic reconstructions of the California coastal system and how post Last Glacial Maximum sea level change and tectonics have altered the landscape</i>
2017	\$1,000	Christeanne Santos	UCSD/SIO (Graduate)	<i>Instability of Thermoremanence and the Problem of Paleointensity Estimation</i>
2018	\$1,000	Gregory Mamikunian	UCSD/SIO (Graduate)	<i>Late Pleistocene Hydroclimate Variability of S. Central Africa captured in a high deposition rate marine sedimentary sequence off the Zambezi River Delta</i>
2018	\$1,000	Abbey Warner	SDSU (Graduate)	<i>Beaches, Dunes and Blowouts – Using GPR to relate coastal features and climates, Coroong Lagoon, South Australia</i>
2018	\$1,000	Eric Surratt	SDSU (Undergraduate)	<i>Reconstructing Coastal Events Recorded in Ancient San Diego River Delta Deposits</i>
2019	\$1,000	Faith Burkett	SDSU (Undergraduate)	<i>Unnamed Aerial Vehicle study of the tectonic geomorphology along the southern Elsinore fault in the Coyote Mountains, Imperial County, CA</i>

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Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
2019	\$1,000	Eric Ryan Surratt	SDSU (Graduate)	<i>Understanding the role of the fault zone architecture of a segment of the San Jacinto fault</i>
2019	\$1,000	Canyon Breyer	UCSD/SIO (Undergraduate)	<i>Development and testing of an economical total alkalinity titration system designed for Ocean Acidification studies</i>
2019	\$1,000	Sean Curran	UCSD/SIO (Graduate)	<i>Volatile content in NAMs and implications for lower crustal stability</i>
2020	\$1,000	Athena Catanzaro	SDSU (Graduate)	<i>Evaluation of submarine landslides in Southern California using geophysical data and GIS</i>
2020	\$1,000	Ryley Hill	SDSU (Graduate)	<i>Can the Lack of Lake Loading Explain the Earthquake Drought on the Southern San Andreas?</i>
2021	\$1,000	William Buckley	SDSU (Graduate)	<i>Examining Tectonically Offset Geomorphic Features Using Aerial Imagery and Field Mapping to Estimate Slip Distribution and Slip-Per-Event for Paleoearthquakes Along the Southernmost San Andreas Fault</i>
2021	\$1,000	Hannah Carney	SDSU (Graduate)	<i>Source of Terrigenous Material offshore Papua New Guinea</i>
2021	\$1,000	Helen Jannke	UCSD/SIO (Graduate)	<i>A Paleoecological Record of Fish Production in the Aegean During the African Humid Period and the Rise of Early Mediterranean Civilizations</i>
2021	\$1,000	Natalia Berrios-Rivera	UCSD/SIO (Undergrad)	<i>Central Anomaly Magnetization High and Crustal Accretion at the East Pacific Rise 9°50'N</i>
2022	\$1,000	Adan Silva	SDSU (Undergraduate)	<i>Analysis of the depositional stratal geometry of the Fish Creek-Vallecito Basin in the Anza-Borrego desert, Southern California</i>
2023	\$1,000	Sarah Engel	SDSU (Undergrad)	<i>Links between submarine landslides and geochemical signatures in the Outer California Borderland</i>
2023	\$1,000	Bradley Keith	SDSU (Graduate)	<i>Patagonia ice sheet and Southern Westerly Wind driven variations in Chilean Margin sediment over the past 900,000 years</i>
2023	\$1,000	Henry Arbaugh	USD (Graduate)	<i>Spatial and temporal variability in microplastic accumulation rates in near-shore and reef sites in the US Virgin Islands</i>

SDAG GENERAL SCHOLARSHIP RECIPIENTS				
Date Awarded	Amount	Name	University / Degree	Title of Abstract / Data Source
2024	\$1,000	Nicholas Oliver	SDSU (Undergrad)	<i>Examination of Middle Cambrian hyolithidans from the Manuels River Formation of Avalonian southeastern Newfoundland</i>
2024	\$1,500	Emily Imperato	SDSU (Graduate)	<i>Constraining Natural and Anthropogenic Controls on Base of Freshwater and Underground Source of Drinking Water (USDW) In Central San Joaquin Valley</i>
2024	\$1,500	Jordan Jaeger	USD (Graduate)	<i>An investigation into the human health risks of lakebed sediments as a proxy for dust chemistry at the Salton Sea</i>
2025	\$4,000	Jennifer Morton	SDSU (Graduate)	<i>Ground-truth Studies of the La Nacion Fault Zone, San Diego, California (Shannon O'Dunn Scholarship)</i>
2025	\$2,000	Hannah Lissner	USD (Graduate)	<i>Assessing the Metals Variability, Clay Mineralogy and Morphology of San Salvador Island Paleosols</i>
2025	\$1,000	CiCi Jobe	USD (Undergraduate)	<i>From Park to Garden: Collaborative Soil Testing to Support Food Security in Urban San Diego</i>

APPENDIX FOUR
BOARD RESOLUTIONS AND MOTIONS

1. Initial Charter approved by Board of Directors 6-0 Motion Approved August 21, 2026.