

The Theodore R. And Vivian M. Johnson Scholarship Program

Theodore (Ted) R. Johnson joined United Parcel Service as an industrial engineer in 1923. He later became the first personnel manager and vice president of industrial relations. He retired in 1952. Ted and Vivian Johnson believed that higher education is essential, not only to the individual but also to the welfare and future of our country - that it leads to better leadership, higher ideals, a fuller life, and a deeper appreciation of social responsibility. The dreams and aspirations of young people to attain what they envision for their future will come from hard work and effort. The Foundation will assist by providing scholarships for those in need. Education will lead them to success and to their goals.

The Theodore R. and Vivian M. Johnson Scholarship Program is for dependent children of full-time or permanent part-time UPS employees and UPS retirees in Florida. Scholarships will be provided to qualified students who have an intense desire to continue their education and who need financial assistance to attain their goals.

The Theodore R. and Vivian M. Johnson Scholarship Program is administered by Scholarship Management Services, a department of Scholarship America. Scholarship America is a national nonprofit educational support and student aid service organization that seeks to involve and assist the private sector in expanding educational opportunities and encouraging educational achievement. Awards are granted without regard to race, color, creed, religion, gender, disability, or national origin.

ELIGIBILITY

The Theodore R. and Vivian M. Johnson Scholarship Program is open to children of regular full-time* or permanent** part-time UPS employees. The UPS employee must:

- Currently reside in Florida and have resided in Florida for the twelve months immediately preceding the application deadline date.
- Have a minimum of one year of employment with the company as of the application deadline date.
- Be employed at UPS at the time the awards are announced.

**Regular full-time at UPS includes approved leaves of absence with or without compensation for military duty, holding union office, prolonged illness, maternity leave, and personal emergencies.*

***A permanent part-time employee is someone who works 15 to 25 hours per week, fills a permanent vacancy and has successfully completed their probationary period. (Union employee – 30 work days and non-union employee – 30 calendar days.)*

Also eligible are children of UPS retirees and deceased UPS employees who were employed with UPS and met the stated employee requirements as of the time of retirement or death. Retirement status as defined by UPS is leaving UPS at the age of 55 or older and receiving retirement benefits from UPS.

Applicants must be high school seniors or graduates who plan to enroll or who are already enrolled in a full-time undergraduate course of study at an accredited two- or four-year college or university, or vocational-technical school in Florida. Students may attend a proprietary vocational school as long as the school is accredited.

Students may wish to spend the first two years in a Florida community college and receive an associate degree; however, applicants are strongly encouraged to complete their education leading to a baccalaureate degree at a four-year Florida institution.

AWARDS

Awards for scholarship recipients attending a four-year college or university range from \$1,000 to \$10,000 for one year of full-time study. Awards for scholarship recipients attending two-year colleges or vocational-technical schools range from \$1,000 to \$5,000 for one year of full-time study. Awards may be used for tuition, fees, books, and room and board. A small number of awards may exceed these amounts; however, awards will not exceed total school costs.

Awards may be used only for undergraduate study at post-secondary institutions in Florida. Awards for four-year schools are renewable for three additional years or until a bachelor's degree is earned, whichever occurs first. Awards for two-year and vocational-technical schools are renewable one time (twice for special circumstances). Two-year students who transfer to a four-year college with no delay are eligible to continue to apply for renewal. Renewal forms will be sent to eligible recipients in December. Renewal is contingent upon satisfactory academic performance in a full-time course of study.

APPLICATION PROCEDURE

Interested students must complete the following application and mail it along with a current, complete transcript of grades to Scholarship America postmarked no later than **April 15**.

Applicants are responsible for gathering and submitting all necessary information. Applications are evaluated on the information supplied; therefore, it is important to answer all questions as completely as possible. Instructions for completing the Financial Data section follow. All information received is considered confidential and is reviewed only by Scholarship America.

SELECTION OF RECIPIENTS

Scholarship recipients are selected solely by Scholarship America on the basis of the applicant's academic record, demonstrated leadership and participation in school and community activities, work experience, a statement of educational and career goals, unusual personal or family circumstances, and a recommendation.

Scholarship America individually evaluates each application using a system in which academic performance is weighted the same as nonacademic activities. Recipients are selected on a competitive basis; therefore, not all applicants may be recipients.

Financial need is a necessary factor in determining the amount of awards once recipients are chosen. Individual scholarship awards will be determined by Scholarship America based on the family's ability to contribute toward the educational expense of the school chosen by the student. Financial need as calculated by Scholarship America must be demonstrated for the student to receive an award.

PAYMENT OF SCHOLARSHIPS

On behalf of the Theodore R. and Vivian M. Johnson Scholarship Foundation, Inc., Scholarship America will process scholarship awards in two equal installments. Recipients will be notified at their home address in early June of each year. Checks will be mailed in mid-August and late December and are payable to the school for the student.

OBLIGATIONS

Recipients have no obligation to the Theodore R. and Vivian M. Johnson Scholarship Foundation, Inc. or to UPS. They are, however, required to supply to Scholarship America any changes of address, school enrollment, or other relevant information. No obligation is assumed by the Foundation or UPS.

REVISIONS

The Theodore R. and Vivian M. Johnson Scholarship Foundation, Inc. reserves the right to review the conditions and procedures of this scholarship program and to make changes at any time.

ADDITIONAL INFORMATION

Questions regarding the scholarship program should be addressed to:

The Theodore R. and Vivian M. Johnson Scholarship Program
Scholarship Management Services, Scholarship America
One Scholarship Way, P. O. Box 297
Saint Peter, MN 56082

Telephone: (507) 931-1682

INSTRUCTIONS FOR COMPLETING THE FINANCIAL DATA SECTION OF THE APPLICATION

The Financial Data section of the application should be completed by the UPS (United Parcel Service) employee. Information should be from a completed tax return or based on estimated information to be filed with the IRS.

1. **State of Residence** is the state where the parents reside and pay state income tax.
2. **Adjusted Gross Income** can be found on IRS FORM 1040 and is gross income reduced by specific adjustments allowed by law.
3. **Total Federal Tax Paid** includes the total amount of **federal** income tax to be paid as reported on IRS FORM 1040. This is **not** the amount withheld from employee's paychecks. (The amount withheld should be adjusted by any refund or additional taxes due.) Do **not** report state income tax.
4. **Total Income** of parent(s) should be reported individually. Provide information for both natural parents, when possible. **If the student resides with only one parent**, financial information **must** be received from the UPS employee. If a parent has remarried, the spouse's information is required if the spouse is a legal guardian of the student, or claims the student as a dependent, or the student is included in the spouse's benefit plan. **If necessary, two Financial Data sections may be submitted by the student.** A copy of the Financial Data section may be made in order for one to be completed by each parent.
5. **Untaxed Income and Benefits** include any other income or benefits **not** included in the adjusted gross income figure. Do **not** include untaxed contributions to retirement plans.
6. **Medical and Dental Expenses** include only those expenses **not** paid by insurance. Do **not** include premium payments.
7. **Total Cash, Checking, Savings, Cash Value of Stocks, etc.**, include liquid assets that can be used for educational expenses. Do **not** include IRA, 401K, or other retirement plan funds.
8. **Total Number of Family Members** living in the household and primarily supported by the reported income includes dependent college students living away from home.
9. **Marital Status** is the current status of the person from whom the financial information is submitted.
10. **Total Number of Family Members Attending College** includes all family members attending a two- or four-year college, university, or vocational-technical school at least half-time. Be sure to include the applicant in this number.

NOTE: Any exceptions to providing financial information as instructed above must be submitted to Scholarship America in writing.



The Theodore R. and Vivian M. Johnson Scholarship Program

TYPE OR PRINT ALL INFORMATION EXCEPT SIGNATURES

Completeness and neatness ensure your application will be reviewed properly.

Application postmark deadline April 15

FOR
SCHOLARSHIP
AMERICA
USE ONLY

I.D. #	AA	PD	RIC/CS	GPA	SATV	SATM	ACTE	ACTM	TOTAL

APPLICANT
DATA

Last Name _____ First _____ Middle Initial _____
 Permanent Home Mailing Address _____ Apartment # _____
 City _____ State FLORIDA Zip Code _____
 Telephone (_____) _____ E-mail Address _____
 Social Security Number _____ Date of Birth: Month _____ Day _____ Year _____
 Please indicate your status. (For statistical purposes only) Male Female
 American Indian/Alaska Native Black/African American Multi Racial White
 Asian Hispanic/Latino Native Hawaiian/Pacific Islander Other _____
 Indicate where you obtained this application:
 Direct Mail High School College Employee's Job Site Internet Other _____

UPS EMPLOYEE
PARENT
OR
GUARDIAN
INFORMATION

Last Name _____ First _____ Middle Initial _____
 Social Security Number _____ Work Telephone (_____) _____
 Fax Number (_____) _____ E-mail Address _____
 Job Title _____ Department _____
 City _____ State FLORIDA Full-time Permanent Part-time Retired
 Relationship to Applicant _____

HIGH
SCHOOL
DATA

School Name _____ High School Graduation Date: Month _____ Year _____
 City _____ State _____ Telephone (_____) _____

POST-
SECONDARY
SCHOOL
DATA

Name of post-secondary school you plan to attend. (If unknown, please list in order of preference the schools to which you have applied.)
Use official school names. Do not use abbreviations.
 _____ City _____ State Florida
 _____ City _____ State Florida
 4 yr. College or University 2 yr. Community or Junior College
 Vocational-Technical School Other, explain _____
 Year in school **next** year: 1 2 3 4 5
 Major or course of study: _____ Expected college graduation date: Month _____ Year _____
 Degree sought: Bachelor Associate Certificate Other, explain _____
 Student will: live on campus live off campus commute from home

If space provided in any section is inadequate, you may continue on additional sheets of paper using the same format. DO **NOT** repeat information already reported on the application form. Your name, address and name of this scholarship program should be included on all attachments.

WORK EXPERIENCE

Describe your work experience during the **past four years** (e.g., food server, babysitting, lawn mowing, office work). Indicate dates of employment for each job and approximate **number of hours worked** each week. List amounts earned at each job.

Employer/Position	From - Mo/Yr	To - Mo/Yr	Hours per week	Amount Earned

ACTIVITIES, AWARDS AND HONORS

List all school activities in which you have participated during the **past four years** (e.g., student government, music, sports, etc.). List all community activities in which you have participated without pay during the **past four years** (e.g., Boy/Girl Scouts, hospital volunteer, Special Olympics). Note all special awards, honors and offices held. **Indicate whether high school or college activities.**

Activity	No. of Years Partic.	Special Awards, Honors	Offices Held	Activity	No. of Years Partic.	Special Awards, Honors	Offices Held

GOALS AND ASPIRATIONS

Make a brief statement or summary of your plans as they relate to your educational and career objectives and long-term goals.

UNUSUAL CIRCUMSTANCES

Please describe how and when any unusual family or personal circumstances have affected your achievement in school, work experience, or your participation in school and community activities.

PARENTS' FINANCIAL DATA (REQUIRED)

Instructions for this section are provided in the guidelines.

The UPS (United Parcel Service) employee must complete this portion of the application. Adjusted gross income and total federal income tax amounts should be from parents' most recently filed tax return. **To be considered for an award, this section must be filled out completely.**

- | | |
|--|---|
| 1. State of Residence <u>FLORIDA</u> | 6. Medical and Dental Expenses not paid by insurance (exclude premiums) \$ _____ |
| 2. Adjusted Gross Income (FORM 1040) \$ _____ | 7. Total Cash, Checking, Savings, and Cash Value of Stocks (exclude retirement plan funds, IRA, 401K) \$ _____ |
| 3. Total Federal Tax Paid (FORM 1040) \$ _____
(Not the amount withheld from paychecks) | 8. Total number of family members living in the household and primarily supported by the reported income ... # _____ |
| 4. Total Income of Father \$ _____ | 9. Marital status of employee parent or guardian:
<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Single |
| Total Income of Mother \$ _____ | 10. Total number of family members attending college at least half-time during the next school year, including applicant # _____ |
| 5. Yearly Untaxed Income and Benefits:
Please indicate source –
<input type="checkbox"/> Social Security <input type="checkbox"/> AFDC <input type="checkbox"/> Child Support
<input type="checkbox"/> Other \$ _____ | |

OTHER AWARDS

Please list the name and annual amount of any grants or scholarships you have been awarded for the coming school year only.

Name of Award:	School to which award will be applied:	Amount:	Check One:
_____	_____	\$ _____	<input type="checkbox"/> Granted <input type="checkbox"/> Pending
_____	_____	\$ _____	<input type="checkbox"/> Granted <input type="checkbox"/> Pending

APPLICANT APPRAISAL (REQUIRED)

To the Applicant: This section is required and must be completed in the format provided. If incomplete, your application will **not** be evaluated. The section is to be completed by a high school or college counselor or advisor, an instructor, or a work supervisor who knows you well.

To the Adult Appraiser: You have been asked to provide information in support of this application. Please give immediate and serious attention to the following statements. When complete, please return to applicant. If you prefer, photocopy this section and return to applicant in a sealed envelope. A letter of recommendation does **not** replace this section.

The applicant's choice of a post-secondary educational program is	<input type="checkbox"/> extremely appropriate	<input type="checkbox"/> very appropriate	<input type="checkbox"/> moderately appropriate	<input type="checkbox"/> inappropriate
The applicant's achievements reflect his/her ability	<input type="checkbox"/> extremely well	<input type="checkbox"/> very well	<input type="checkbox"/> moderately well	<input type="checkbox"/> not well
The applicant's ability to set realistic and attainable goals is	<input type="checkbox"/> excellent	<input type="checkbox"/> good	<input type="checkbox"/> fair	<input type="checkbox"/> poor
The quality of the applicant's commitment to school and/or community is	<input type="checkbox"/> excellent	<input type="checkbox"/> good	<input type="checkbox"/> fair	<input type="checkbox"/> poor
The applicant is able to seek, find, and use learning resources	<input type="checkbox"/> extremely well	<input type="checkbox"/> very well	<input type="checkbox"/> moderately well	<input type="checkbox"/> not well
The applicant demonstrates curiosity and initiative	<input type="checkbox"/> extremely well	<input type="checkbox"/> very well	<input type="checkbox"/> moderately well	<input type="checkbox"/> not well
The applicant demonstrates good problem-solving skills, follows through, and completes tasks	<input type="checkbox"/> extremely well	<input type="checkbox"/> very well	<input type="checkbox"/> moderately well	<input type="checkbox"/> not well
The applicant's respect for self and others is	<input type="checkbox"/> excellent	<input type="checkbox"/> good	<input type="checkbox"/> fair	<input type="checkbox"/> poor

Comments: _____

Appraiser's Name _____ Title _____ Telephone (_____) _____

Signature _____ Organization _____ Date _____

TRANSCRIPT INFORMATION

An official transcript of grades **must** be sent with this application. On-line transcripts and grade reports are **not** acceptable.

1. Students currently or previously enrolled in college or vocational-technical school must include all college or vo-tech transcripts of grades. (Completion of the high school information is not necessary.)

2. High school seniors and students who have completed less than one full quarter or semester of post-secondary education **must** include a high school transcript of grades and have this section completed by the appropriate school official. **(A clear explanation of the school's grading scale must also be submitted.)**

Applicant ranks _____ in a class of _____	Cumulative Grade Point Average	PSAT		SAT 1		ACT	
	Weighted: _____ /4.0 scale	Verbal	Math	Verbal	Math	English	Math
	Unweighted: _____ /4.0 scale						

School Official's Signature _____ Date _____ Title _____ Telephone (_____) _____

School Official's Address: Street _____ City _____ State _____ Zip _____

APPLICATION CHECKLIST

The student is responsible for submitting all materials to Scholarship America on time. Incomplete applications will not be evaluated. This application becomes complete and valid only when Scholarship America has received all of the following materials:

- Student Application with completed Applicant Appraisal
 - Current Complete Transcript(s) of Grades (including grading scale)
- On-line transcripts are **not** acceptable.

All materials, including transcript, must be addressed to:

The Theodore R. and Vivian M. Johnson Scholarship Program
Scholarship Management Services, Scholarship America
One Scholarship Way, P.O. Box 297
Saint Peter, MN 56082

Postmark deadline April 15

CERTIFICATION

Scholarship America has the sole responsibility for selecting recipients based on criteria as set forth in the program's descriptive brochure. This application becomes the property of Scholarship America. (It is recommended that you keep a copy for your files.)

I acknowledge decisions of Scholarship America are final. I certify that I meet the basic eligibility requirements of the program as described in the brochure and that the information provided is complete and accurate to the best of my knowledge. If requested, I agree to provide proof of information I have given on this form, including a copy of my U.S. Income Tax Return. Falsification of information may result in termination of any scholarship granted.

Applicant's Signature _____ Date _____

UPS Employee's Signature _____ Date _____