

The Johnson Scholarship Foundation Scholarship Program

Program Guidelines

THE PROGRAM

Theodore 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. Theodore 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 Johnson Scholarship Foundation will assist by providing scholarships for those in need. Education will lead them to success and to their goals.

The Johnson Scholarship Foundation 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 Johnson Scholarship Foundation Scholarship Program is administered by Scholarship Management Services[®], a division of Scholarship America[®]. Scholarship Management Services is the nation's largest designer and manager of scholarship and tuition reimbursement programs for corporations, foundations, associations and individuals. Awards are granted without regard to race, color, creed, religion, sexual orientation, gender, disability or national origin

ELIGIBILITY

The Johnson Scholarship Foundation 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 full-time undergraduate study at an accredited four-year college or university, community college, state college, or vocational-technical school in Florida. Students may attend a proprietary vocational school as long as the school is accredited.

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 community colleges, state colleges, or vocational-technical schools range from \$1,000 to \$5,000 for one year of full-time study. Awards may be used for educational expenses. A small number of awards may exceed these amounts; however, awards will not exceed total school costs. Awards are for undergraduate study only.

Awards may be used only for undergraduate study at postsecondary institutions in Florida. Awards are renewable for three additional years or until a bachelor's degree is earned, provided full-time enrollment is maintained. Community college, state college, or vocational-technical students who transfer 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 full-time study.

APPLICATION

Interested students must complete the application and mail it along with a current, complete transcript of grades to Scholarship Management Services postmarked no later than **April 15**. Grade reports and grade audits are not acceptable. Unofficial transcripts must display student name, school name, grade and credit hours earned for each course, and term in which each course was taken. Applicants will receive acknowledgment of receipt of their application. If an acknowledgment card is not received within three weeks, applicants may call Scholarship Management Services to verify that the application has been received.

Applicants are responsible for gathering and submitting all necessary information. Instructions for completing the Financial Data section of the application are included. Applications are evaluated on the information supplied; therefore, answer all questions as completely as possible. Incomplete applications will not be evaluated. All information received is considered confidential and is reviewed only by Scholarship Management Services.

SELECTION OF RECIPIENTS

Scholarship recipients are selected on the basis of academic record, demonstrated leadership and participation in school and community activities, honors, work experience, statement of goals and aspirations, unusual personal or family circumstances, and an outside appraisal.

Scholarship Management Services 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 Management Services 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 Management Services must be demonstrated for the student to receive an award.

Selection of recipients is made by Scholarship Management Services. In no instance does any officer or employee of the Johnson Scholarship Foundation or UPS play a part in the selection. All applicants agree to accept the decision as final.

Applicants will be notified in early June at their home address.

PAYMENT OF SCHOLARSHIPS

Scholarship Management Services processes Johnson Scholarship Foundation scholarship payments on behalf of the Johnson Scholarship Foundation. Payments are made in equal installments on August 1 and December 30. Checks are mailed to each recipient's home address and are made payable to the school for the student.

OBLIGATIONS

Recipients have no obligation to the Johnson Scholarship Foundation or to UPS. They are, however, required to notify Scholarship Management Services of any changes in address, school enrollment, or other relevant information and to send a complete transcript when requested.

REVISIONS

The Johnson Scholarship Foundation 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 Johnson Scholarship Foundation
Scholarship Program
Scholarship Management Services
One Scholarship Way
Saint Peter, MN 56082

Telephone: (507) 931-1682

Administered by
Scholarship America®

**Scholarship
Management
Services**

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 **and** from the parent who claims the child as a dependent for tax purposes. 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.**, includes 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 may include:
 - the applicant
 - the applicant's parents
 - other children living in the household
 - dependent college students living away from home
 - other people who live in the household and receive more than half of their support from the reported income
9. **Marital status** is the current status of the person from whom the financial information is submitted.
10. **Of the total number of family members on line 8, number of students attending college** includes family members attending a two- or four-year college, university, or vocational-technical school at least half-time. Include the applicant in this number. Do not include parents.

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