

# The Theodore R. and Vivian M. Johnson Scholarship Program

## Program Guidelines

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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 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<sup>®</sup>, a division of Scholarship America<sup>®</sup>. 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 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 postsecondary institutions in Florida. Awards for four-year schools are renewable for three additional years or until a bachelor's degree is earned, provided full-time enrollment is maintained. 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 Management Services 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 Management Services.

## **SELECTION OF RECIPIENTS**

Scholarship recipients are selected solely by Scholarship Management Services 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 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.

## **PAYMENT OF SCHOLARSHIPS**

On behalf of the Johnson Scholarship Foundation, Scholarship Management Services 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 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. No obligation is assumed by the Johnson Scholarship Foundation or UPS.

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

Telephone: (507) 931-1682

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## INSTRUCTIONS FOR COMPLETING THE FINANCIAL DATA SECTION OF THE APPLICATION

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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 Management Services in writing.

