

# The Portland Foundation

and

## Lilly Endowment Inc.

present

### Lilly Endowment Community Scholarship Program Fact Sheet and Scholarship Application

(Revised July 2013)

#### Program Description

- The scholarship will provide full tuition, required fees and a special allocation of up to \$900 per year for required books and equipment for four years of full-time undergraduate study leading to a baccalaureate degree at any Indiana public or private college or university accredited by the Higher Learning Commission of the North Central Association of Colleges and Schools
- The program is open to all members of the class of 2014 who are Jay County residents and have graduated from a regionally accredited Indiana high school
- The scholarship applicant must have been accepted to pursue a full-time baccalaureate course of study in the fall of 2014.
- The scholarship applicant must have a minimum 3.5 grade point average on a 4.0 scale at the time of application
- The scholarship applicants are scored in the areas of Academics, Financial Need, Activities, and Written Essay.
- The scholarship applicant must complete and submit the application on or before January 3, 2014 to The Portland Foundation at [jcook@portlandfoundation.org](mailto:jcook@portlandfoundation.org)
- The Portland Foundation will submit nominees to Independent Colleges of Indiana (ICI) in Spring 2014, who will make the final selection of the scholarship recipient(s)
- For additional information, contact Program Officer Jessica Cook at (260) 726-4260

DEADLINE FOR APPLICATION TO BE SUBMITTED TO THE PORTLAND FOUNDATION

IS:

**JANUARY 3, 2014 @ 5:00 PM**

**\*PLEASE NOTE\*** Late applications may not be considered by the selection committee.

THE 2014 LILLY ENDOWMENT COMMUNITY SCHOLARSHIP APPLICATION  
(Must be computer generated.)

**STUDENT IDENTIFICATION INFORMATION:**

NAME \_\_\_\_\_  
(Last) (First) (MI)

MAILING (HOME) ADDRESS \_\_\_\_\_  
(Number, Street and Apartment Number)  
\_\_\_\_\_  
(City) (State) (Zip Code)

TELEPHONE NUMBER \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

MARK ONE: I am single I am married I am legally separated

Father/Guardian Name \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

Mother/Guardian Name \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

**A completed application should contain the following:**

- [ ] Application filled out electronically and **qt li lpc nRF H**(no scans please) emailed to [jcook@portlandfoundation.org](mailto:jcook@portlandfoundation.org)
- [ ] Phone number where student or parent can be reached with any questions
- [ ] Requested typed signatures on page 2 and 4
- [ ] Completed Essay

**In submitting this application I certify that the information provided is complete and accurate to the best of my knowledge. Falsification of information may result in termination of any scholarship granted.**

**If selected as a finalist, I agree to participate in an interview with the nomination committee.**

**If I receive this scholarship, it is my intent to pursue four years of undergraduate study on a full-time basis leading to a baccalaureate degree at an Indiana college.**

**I understand that the total amount of my scholarship is calculated on the basis of my chosen college's tuition and required fees beginning with the 4236/4237 school year.**

**To assist with the processing of my scholarship payments each semester or quarter and to avoid late fees, I will forward immediately upon receipt to The Portland Foundation all invoices for tuition and any eligible fees that may be covered by my scholarship.**

**I will account for and return to Independent Colleges of Indiana any amount of the special allocation for required books and required equipment remaining at the end of each school year.**

**I agree to notify Independent Colleges of Indiana of any scholarship awards I may receive for tuition or required fees from a source other than the Lilly Endowment Community Scholarship.**

**I will keep The Portland Foundation apprised annually by June 1<sup>st</sup> of my enrollment academic status during college, by completing and returning any surveys or forms as may be provided by the community foundation.**

**Upon graduation, I will keep The Portland Foundation apprised annually by June 1<sup>st</sup> of my education and/or employment status for at least ten (10) years after graduation, by completing and returning an alumni survey or other forms as may be provided by the community foundation.**

Applicant's signature \_\_\_\_\_ Date \_\_\_\_\_  
typed signature & date

Parent/Guardian signature \_\_\_\_\_ Date \_\_\_\_\_  
typed signature & date

**Using 2014 tax information, please fill out the following information.**

*The following information is imperative to determine your financial need score. Please be as accurate and forthcoming as possible, knowing that any falsification of information may result in the disqualification of any scholarship award. Failure to submit any financial information will result in a score of "zero" out of ten possible points. If an item does not apply to your situation, please enter a zero or "NA."*

**Student Information:**

Did you file a 2012 tax return?      Yes      No  
Which tax form did you use?      1040      1040A      1040EZ  
What was your adjusted gross income for 2012? \_\_\_\_\_  
What was the total amount of your income tax for 2012? \_\_\_\_\_  
What was the number of exemptions claimed for 2012? \_\_\_\_\_  
How much did you earn from working (wages, salaries, tips, etc) in 2012? (Answer whether or not you filed a tax return). \_\_\_\_\_  
What is the current balance of your cash, savings, and checking accounts? \_\_\_\_\_  
What is the net worth of your investments, including real estate? \_\_\_\_\_  
What is the current net worth of your business and/or investment farms? \_\_\_\_\_  
Do you receive veterans' education benefits?      Yes      No  
Do you have children that receive more than half of their support from you?      Yes      No  
Are both of your parents deceased, or are you now or were (until age 18) a ward/dependent of the court?  
Yes      No

**Parent Information:**

Your marital status:      Married/Remarried      Single      Divorced/Separated      Widowed  
How many people are in your household? \_\_\_\_\_  
How many children in the above question will be college students between July 1, 2014 and June 30, 2015? \_\_\_\_  
What is your state of legal residence? \_\_\_\_\_  
What is the age of the older parent? \_\_\_\_\_  
Did you file a 2012 tax return?      Yes      No  
If you filed a 1040, were you eligible to file a 1040A or 1040EZ?      Yes      No  
What was your adjusted gross income for 2012? \_\_\_\_\_  
What was the total amount of your income tax for 2012? \_\_\_\_\_  
What was the number of your exemptions for 2012? \_\_\_\_\_  
How much did you earn from working (wages, salaries, tips, etc) in 2012? (Answer whether or not they filed a tax return).      Father \_\_\_\_\_  
Mother \_\_\_\_\_

Did you receive earned income credit (1040 line 64a, 1040A line 41a, 1040EZ line 9a)? Amount \_\_\_\_\_  
Did you receive additional child tax credit (1040 line 65, 1040A line 42)? Amount \_\_\_\_\_  
Did you receive welfare benefits? Amount \_\_\_\_\_  
Did you receive Social security benefits that were not taxed (such as SSI)? Amount \_\_\_\_\_

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to amounts reported on the W-2 Form in boxes 12a through 12d. Amount \_\_\_\_\_  
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 line 28, or 1040A line 17. Amount \_\_\_\_\_  
Child support your parents *received* for all children. Do not include foster care or adoption payments. Amount \_\_\_\_\_

Tax exempt interest income from IRS Form 1040 line 8b or 1040A line 8b. Amount \_\_\_\_\_  
Foreign income exclusion from IRS Form 2555 line 42 or 2555EZ line 18. Amount \_\_\_\_\_  
Untaxed portions of IRA distributions from IRS Form 1040 lines 15a minus 15b or 1040A line 11a minus 11b.  
Exclude rollovers. If negative, enter zero. Amount \_\_\_\_\_  
Untaxed portions of pensions from IRS Form 1040 lines 16a minus 16b or 1040A line 12a minus 12b. Exclude  
rollovers. If negative, enter zero. Amount \_\_\_\_\_  
Credit for federal tax on special fuels from IRS Form 4136 line 18-Nonfarmers only. Amount \_\_\_\_\_  
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash  
payments and cash value of benefits). Amount \_\_\_\_\_  
Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation  
(DIC) and/or VA Educational Work-Study allowances. Amount \_\_\_\_\_  
Any other untaxed income or benefits not reported above, such as worker's compensation, untaxed portions of  
railroad retirement benefits, Black Lung Benefits, disability, etc. Amount \_\_\_\_\_

Educational credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 line 49 or 1040A line 31.  
Amount \_\_\_\_\_

Child support you *paid* because of a divorce or separation or as a result of a legal requirement. Amount

\_\_\_\_\_ Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based  
employment portions of fellowships and assistantships. Amount \_\_\_\_\_

Student grant and scholarship aid reported to the IRS in your adjusted gross income. Amount \_\_\_\_\_

What is the current balance of your cash, savings, and checking accounts? \_\_\_\_\_

What is the net worth of your investments, including real estate (not your home)? \_\_\_\_\_

What is the current net worth of your business and/or investment farms? (Do not include a farm that you live  
on and operate). \_\_\_\_\_

***I certify that all financial information presented in this application is true and accurate to the best of my  
knowledge. If asked, I will present copies of my most recent tax return to verify the information listed. I  
know that any falsification of information will result in the termination of any scholarship award offered  
and will disqualify the student from the scholarship selection process.***

Applicant's signature \_\_\_\_\_ Date \_\_\_\_\_  
typed signature & date

Parent/Guardian signature \_\_\_\_\_ Date \_\_\_\_\_  
typed signature & date

**HOUSEHOLD INFORMATION:** (Information in this section should reflect information only about where the student is living; that is, custodial parent).

What is your parents' current marital status

Single      Married      Separated      Divorced      Widowed

With whom is the student living?      Both Parents      Mother      Father      Mother and Stepfather  
Father and Stepmother      Legal Guardian

Total Number of family members currently living in your household: \_\_\_\_\_

# Brothers (include step & half) \_\_\_\_\_      # Sisters (include step & half) \_\_\_\_\_

# Other (please explain) \_\_\_\_\_

Number of college students, *including yourself*, in the household **next school year:** \_\_\_\_\_

Year in school      School Attending

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Has any member of your immediate family received **any** post-secondary education?      Yes      No

Who (parent, sibling) {no names please}?

How much? (Please mark all that apply)      Some college      Certificate      Associates

Bachelors      Masters      PhD

**FINANCIAL INFORMATION:**

**\*PLEASE NOTE\*\* The Portland Foundation has policies and procedures for ensuring the confidentiality of all scholarship information collected, used or maintained. Only those involved with the scholarship selection process (i.e. Scholarship Committees and Staff) will have access to the financial information submitted.**

FOR PURPOSES OF CONFIDENTIALITY SEPARATED OR DIVORCED PARENT MAY SUBMIT INFORMATION ON SEPARATE FORMS.

On whose tax return was the student claimed as an exemption in the last year taxes were filed?

Joint      Father      Mother      Legal Guardian      Student

If additional questions should arise with regard to the financial data requested, the Foundation reserves the right to request for review a copy of the most recent tax return filed by the applicant, or the applicant's parents, if a dependent.

Describe any unusual financial circumstances or need which might have a bearing on this application {no names please} (you may attach a separate sheet if necessary):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Current Loan Indebtedness for college related expenses of Parent (i.e. student loans, Parent Plus loans, etc.) \_\_\_\_\_

**STUDENT ACTIVITY**

Name of university, college or technical school you plan to attend, in order of preference:

_____	_____	Accepted?	Yes	No
School	Location	Pending:		
_____	_____	Accepted?	Yes	No
School	Location	Pending:		
_____	_____	Accepted?	Yes	No
School	Location	Pending:		

What is your intended major or program of study? \_\_\_\_\_

This is a      1 year      2 year      3 year      4 year or longer program of study.

If you have been accepted by a college or university, have you been notified that you will receive any financial aid from that institution which will be applied toward your college expenses?    Yes      No  
 If yes, please indicate amount \_\_\_\_\_ (total or per year?) Which school? \_\_\_\_\_  
 please indicate amount \_\_\_\_\_ (total or per year?) Which school? \_\_\_\_\_  
 please indicate amount \_\_\_\_\_ (total or per year?) Which school? \_\_\_\_\_

Have you been notified that you will receive any additional scholarships from any other organization?  
 Yes      No    If yes, please indicate amount \_\_\_\_\_ (total or per year?)  
 please indicate amount \_\_\_\_\_ (total or per year?)  
 please indicate amount \_\_\_\_\_ (total or per year?)

Are you a 21<sup>st</sup> Century Scholar?    Yes

List all school and community activities in which you have participated and any honors which you might have received.

<b>Activity</b>	<b>Cj gemGrade(s) "*****"</b>				<b>Awards, honors, offices, etc</b>
Academic Competition	9	10	11	12	
Band	9	10	11	12	
Baseball	9	10	11	12	
Basketball	9	10	11	12	
Bowling	9	10	11	12	
Campus Life	9	10	11	12	
Cheerleader	9	10	11	12	
Choir	9	10	11	12	
Church Activities	9	10	11	12	
Class Officer	9	10	11	12	
Cross Country	9	10	11	12	
Drama Club	9	10	11	12	
Earth Watch	9	10	11	12	
Fellowship of Christian Athletes	9	10	11	12	

Football	9	10	11	12
4-H	9	10	11	12
FFA	9	10	11	12
Foreign Exchange Club	9	10	11	12
French Club	9	10	11	12
German Club	9	10	11	12
Golf	9	10	11	12
Guard	9	10	11	12
Gymnastics	9	10	11	12
Intramurals	9	10	11	12
JayKom (Mentoring)	9	10	11	12
JC Alive	9	10	11	12
JCL	9	10	11	12
Jay Today Staff	9	10	11	12
Key Club	9	10	11	12
LEO Club	9	10	11	12
National Honor Society	9	10	11	12
Newspaper	9	10	11	12
PRIDE	9	10	11	12
PVE	9	10	11	12
Quill	9	10	11	12
Robotics	9	10	11	12
Scouts	9	10	11	12
Ski Club	9	10	11	12
Soccer	9	10	11	12
Softball	9	10	11	12
Spanish Club	9	10	11	12
Student Council	9	10	11	12
School Musical / Plays	9	10	11	12
Student Exchange Club	9	10	11	12
S.W.A.T.	9	10	11	12
Swimming	9	10	11	12
Swing Choir	9	10	11	12
Tennis	9	10	11	12
Thespian Society	9	10	11	12
Track	9	10	11	12
Wrestling	9	10	11	12
Volleyball	9	10	11	12
Yearbook	9	10	11	12
Y-Teens	9	10	11	12
Youth For Christ	9	10	11	12
	9	10	11	12
	9	10	11	12
	9	10	11	12



Community Activities

	9	10	11	12
_____	9	10	11	12
_____	9	10	11	12
_____	9	10	11	12
_____	9	10	11	12
_____	9	10	11	12

During your high school years did you work during vacations, outside of school hours or during summers?  
 Yes

If yes, during what years of school did you work? Please include work on family farm.

	Dates during school year	Number of hours worked per week	Employer	Dates during summer	Number of hours worked per week	Employer
Fr.	_____	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____	_____
So.	_____	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____	_____
Jr.	_____	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____	_____
Sr.	_____	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____	_____
	_____	_____	_____	_____	_____	_____

Will it be necessary for you to work while pursuing a higher education? Yes

If yes, approximately how many hours do you anticipate working per week? \_\_\_\_\_

**ESSAY REQUIREMENT:** Please type and attach a separate sheet with no names or identifying information please. In 500-800 words, please discuss two of the following: why you want to go to college, why you have selected your intended major and career plans, or how you feel about community involvement.

Essays will be judged on content, grammatical construction, word choice (not vocabulary), spelling and punctuation. This is an opportunity to display your ability to effectively communicate.