

## **TEXO Bill Weston Scholarship Fund**

In 2000 in honor of Bill Weston, the Bill Weston Scholarship Fund was set up by the Safety Committee. This fund was created through voluntary contributions by TEXO members, as well as other interested in its objective. The fund should be self sustaining within the first five years from its inception.

Scholarships will be awarded through Education and Research Foundation to full-time undergraduate students and apprenticeship craft training students and high school students enrolled in construction studies.

The Bill Weston Scholarship is a self-supporting scholarship program. It was established to assist in providing the construction industry with trained employees through higher learning and craft training.

The Bill Weston Scholarship is supported by voluntary contributions obtained by holding yearly fund raisers. All contributions are tax deductible.

Candidates must apply directly to the TEXO Bill Weston Scholarship Awards Committee. Candidates are considered based on their interest in construction, grades, extracurricular activities, employment experience and financial need. Semi-finalists are subject to a personal interview by a representative of the Awards Committee.

- A. Candidates must be currently enrolled and have at least one year remaining in a construction-related degree program. OR
- B. Candidates must be enrolling in a Bureau of Apprenticeship (BAT) approved trade or craft training school, studying a craft trade directly related to the construction industry.

The Bill Weston Scholarship will be administered by the Education and Research Foundation and is done so under the criteria set forth by TEXO.

Further details and information can be obtained through the Scholarship Awards Committee. The Awards Committee will consist of the chapter President, one chapter staff, Chapter Chair, and Chapter Chair Elect, two chapter members and a Construction Education Foundation administrator representative. The association is proud of its contributions made to the construction industry through its members and continues to work toward the betterment of the industry.

### **AWARDS COMMITTEE DUTIES:**

1. In conjunction with the Administrator, determine if changes are needed to any forms, guidelines or operating procedures.
2. Review and evaluate applications as forwarded to TEXO.
3. Participate in the committee meeting to select semifinalists and conduct personal interviews.
4. Forward all request for expense reimbursement to Administrator in a timely manner.
5. Other duties that may be required or requested.

#### AWARDS COMMITTEE CHAIRMAN DUTIES:

1. Coordinate the personal interview process through completion.
  - A. Select and contact personal interviews to determine their willingness to serve on Committee.
  - B. Send letter of confirmation, guidelines, evaluation form and semifinalist's application to each interviewer. Enclose a Statement of Expense form to be returned to the Administrator.
  - C. Coordinate with the Administrator who will send follow-up letters to interviewers advising if the applicant was successful or not.
  - D. Notify all semifinalists of their status and awards and non-awards.
  - E. Request school registration information from finalists.

#### ADMINISTRATOR'S DUTIES (CEF):

1. Maintain records of the Foundation.
2. Receive and forward all scholarship awards.
3. Acknowledge all contributions.
4. Distribute applications and other materials as requested.
5. Maintain liaison with TEXO thru Awards Committee.
6. Answer inquiries regarding the program.
7. Prepare and present a yearly report.
8. Attend the Awards Committee meetings.
9. In conjunction with the Awards Committee, select the top-rated applicants before and after receiving personal interview evaluations. This may/may not require a conference call.
10. Release funds on or about August 1.
11. Forward copy of payment to Awards Committee.
12. Prepare and present an annual report in August/September of each year.

## SCHOLARSHIP CALENDAR OF EVENTS

### **August/September**

- Annual Report for Chapter Planning Conference.
- Applications distributed to construction industry mailing list, special request and Education and Research Foundation.

### **October through January**

- Answer special request.
- File all applications as they are received by mail or web site.
- Notify Awards Committee of meetings
- Make arrangements to review trust.

### **February**

- Review all materials for completeness.

### **March/April**

- Evaluate applications, allowing at least three (3) weeks for evaluation process.
- Last minute correspondence and meeting details.
- Awards Committee meets and selects semi-finalists and determines who will conduct personal interviews.
- Prepare mid-year report.

### **April/May**

- Personal interviews conducted. Awards Committee evaluations will determine winners.
- Non-winners notified and thanked for applying.

### **June**

- All recipients notified of selection and requested to send registration information; advising them that checks are issued in August.
- Prepare press releases
- Ask recipient(s) to attend the Membership Meeting.

### **July**

- Order following year's applications from printer
- Order letterhead, envelopes, brochures, posters, if necessary

### **August**

- Authorize Administrator to release check(s) as information is received from scholars; forward verification sheet (receipt) to send with checks to scholarship recipients.
- Prepare reports for chapter planning conference.

**AWARDING SCHOLARSHIPS  
THROUGH THE  
EDUCATION AND RESEARCH FOUNDATION (ERF)**

Award academic scholarships through the TEXO Bill Weston Fund by making tax-deductible charitable contributions to it. The following guidelines, along with some commonly asked questions and answers, have been prepared for those wishing to use this option.

1. The Administrator must be notified of the intent to use this method of award prior to February 1<sup>st</sup> of each year.
2. Chapter may specify the school and field of study for the award.
3. Chapter must specify the amount of the award(s) and submit a check sufficient to cover the scholarship award and the administration fee. Administration fee is \$50 for the first award and \$25 for each additional awards (i.e., submit a check in the amount of \$550 for a \$500 award; for two \$500 awards, submit \$1,000 plus \$50 for the first award and \$25 for the second award for a total of \$1,075). The minimum scholarship which will be administered is \$500, with additional increments of \$100, \$200, \$300, etc.
4. If the chapter solicits funds for a scholarship award by telling donors their contributions are tax-deductible as charitable donations, then the money raised must be kept in a separate account, with a separate ledger to identify the funds. These monies must be sent to ERF, which is a 501(c) (3) designated organization. This is necessary in order for donors to take a deduction on their income tax for the year in which they gave the money.
5. Chapter may suggest a name for the award, although ERF retains the right to reject any suggestion that does not seem appropriate. Appropriate suggestions for scholarship names would be in the name of the chapter, a distinguished past member or officer of the chapter, or a local employer who has been very supportive of the chapter.
6. The standard application forms will be used to solicit applications for the award. The award will be made in strict adherence to EEO guidelines and according to the qualifications of the applicants. While TEXO member and their families are welcome to apply for consideration, no preferential treatment will be given to them due to their membership or relationship with the TEXO chapter.
7. ERF will endeavor to make the award according to the criteria provided by the chapter. If this is not possible, ERF will confer with the chapter contact in an attempt to select another qualified applicant as close to the criteria as possible. In the event the chapter and ERF are unable to award a scholarship that meets the specified criteria, the chapter must instruct ERF if the funds are to be held until the following academic year or returned to them.

## COMMONLY ASKED QUESTIONS:

1. What are the advantages of awarding a scholarship through ERF?

- Donations received can be tax-deductible due to the foundation's 501 (c ) (3) status.
- TEXO members and families, who would not be eligible for scholarships from TEXO, under current IRS regulations, can apply for ERF administered scholarships.
- An experienced committee, acquainted with a broad variety of schools, programs and evaluation techniques can handle the administration.
- Increased base of candidates for award selection.

2. Must the entire amount of scholarship account be turned over to the ERF?

- No. You need only to fund the amount of the award(s) plus administration fee(s) that you wish to award in any particular year. Note: All funds that are solicited as charitable contributions must be turned over either to ERF or some other qualified tax-exempt organization.

3. What does the administration fee cover?

- Costs of duplication and distribution of applications
- Postage, photocopying, long distance telephone calls and facsimiles.
- Secretarial support, if required.
- Personal interviews for candidates, if required.
- Bank charges for handling funds.

4. If we decide to participate, do we have to award a scholarship every year through ERF?

- No. A continuing award is certainly an option, but the ERF will administer one-time awards.

**CHAPTER APPLICATION FOR ERF ADMINISTRATION  
OF SCHOLARSHIP AWARD**

**Date:** \_\_\_\_\_

Name of Chapter and region \_\_\_\_\_  
\_\_\_\_\_

Name of Award(s) \_\_\_\_\_

Amount of Award(s). See Guidelines for award amounts, increments and administration fee.

Award Amount \$ _____	Administration Fee \$50.00	Total \$ _____
Award Amount \$ _____	Administration Fee \$25.00	Total \$ _____
Award Amount \$ _____	Administration Fee \$25.00	Total \$ _____
Award Amount \$ _____	Administration Fee \$25.00	Total \$ _____

TOTAL ENCLOSED:        \$ \_\_\_\_\_

We wish to have the award made at (school or state of award) \_\_\_\_\_  
\_\_\_\_\_

PLEASE BE SPECIFIC: Geographic references within particular states are not enough information for ERF to locate the eligible student.

Circle one (A or B)

A. We wish the award to be made to a student majoring in: \_\_\_\_\_  
\_\_\_\_\_

B. We wish the award to be made to a student majoring in a construction –related field: \_\_\_\_\_  
\_\_\_\_\_

We understand that every effort to award a scholarship according to the criteria that we have set out in this application will be made. In the event it is unable to do so, we understand that ERF will contact us about the possibility of using our funds to award a scholarship to another qualified recipient as close to our original intent as possible.

Chapter President \_\_\_\_\_ Scholarship Chair \_\_\_\_\_

Address \_\_\_\_\_ Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_ Phone \_\_\_\_\_

Check must accompany application.

The CEF Administrator must receive form and check by February 1<sup>st</sup>.