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## Welcome

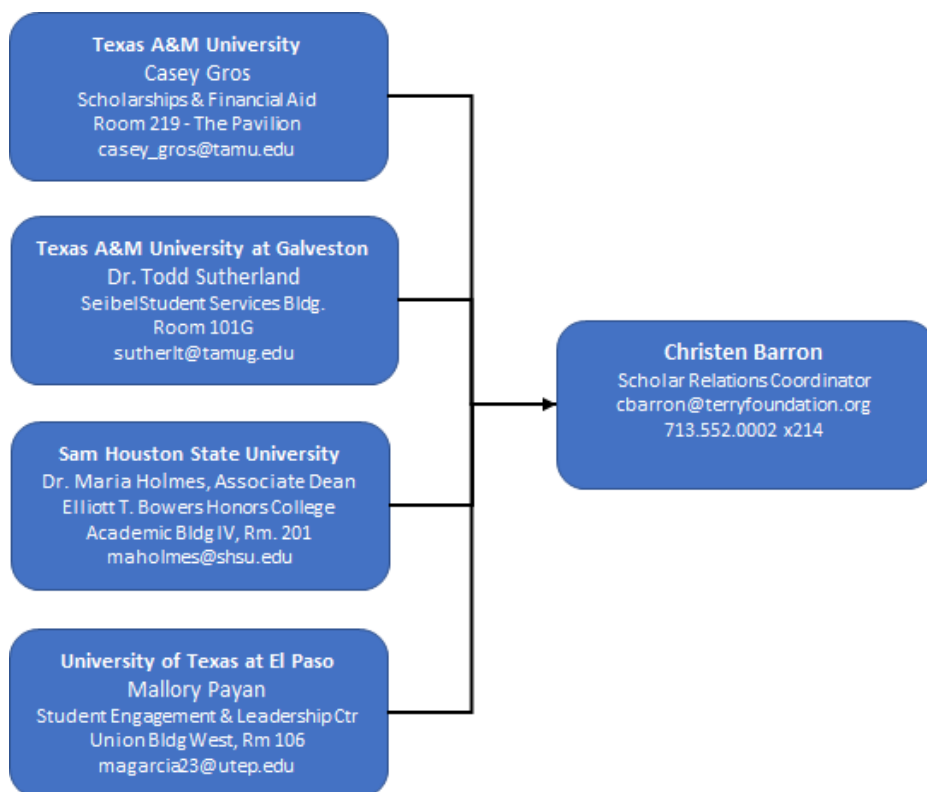
Throughout your undergraduate career, you will make decisions that affect your Terry Foundation scholarship. This handbook addresses those situations, recommends who to contact, and details your responsibilities to the Terry Scholarship program.

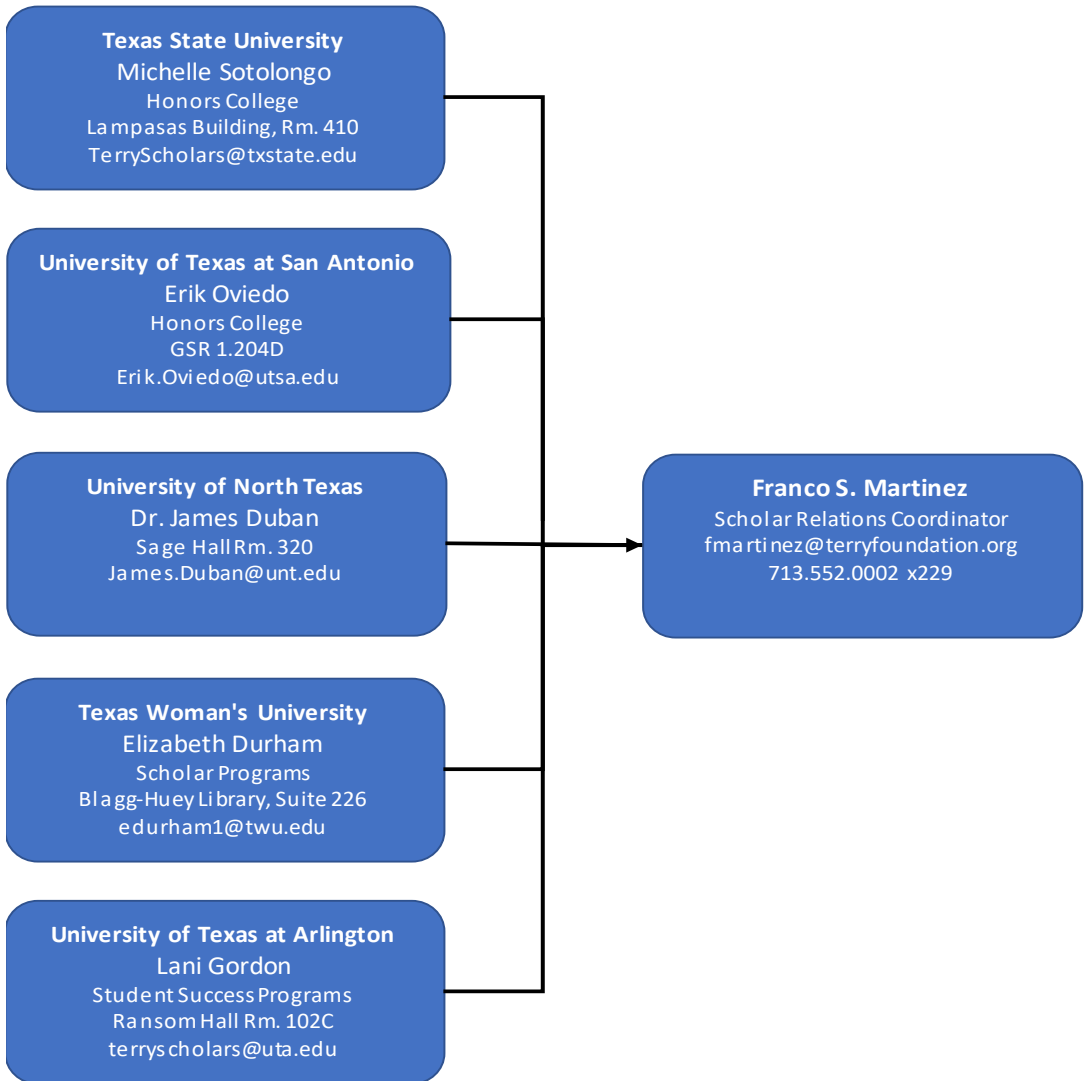
You were chosen as a Terry Scholar based on several criteria, including academic potential, leadership, and financial need. Because you have accepted the honor and the responsibility of becoming a Terry Scholar, the Foundation is committed to investing significant financial support, time, and other Foundation resources in you and your education. Your cooperation in carrying out your responsibilities, as outlined in this handbook, is one way of acknowledging and expressing appreciation for the Foundation's investment.

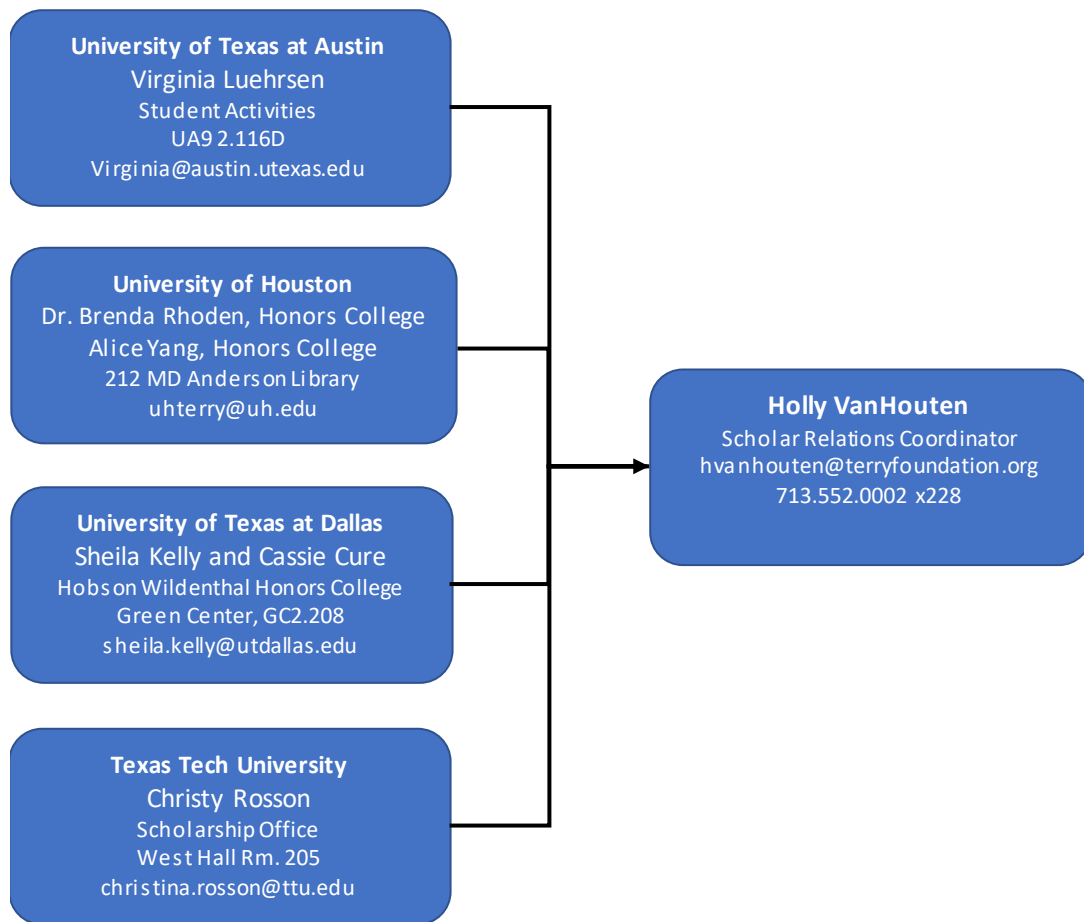
Since 1987, the Terry Foundation has awarded scholarships for up to eight semesters to high school seniors who enter college as freshmen ("Traditional Scholars"). In 2013, the Foundation began awarding scholarships for up to six semesters to transfer students ("Transfer Scholars"). For the purposes of this Handbook, Traditional and Transfer students are referred to collectively as "Terry Scholars."

## Your Terry Campus Coordinator and Foundation Contact

When you need to speak one-on-one with someone regarding your Terry Scholarship, contact your Terry Campus Coordinator **first**. If you still require assistance after conferring with your Terry Campus Coordinator, contact your Scholar Relations Coordinator at the Foundation offices.







When you contact the Foundation offices by email, your communication should receive a response within three business days. If you have not received a response within that time, call your Scholar Relations Coordinator directly at the Foundation offices. Please ensure that you include your first and last name as well as university on all email correspondence.

### ***Resources for Supporting Your Success***

The Foundation understands that you may encounter academic difficulties, but we expect you to seek assistance. If you find yourself having a difficult semester, we expect you to take action.

You should utilize all available on-campus academic resources, including academic advisors, tutoring services, study groups, and career services. Remember that time management is a key component of academic success.

In addition to your Terry Campus Coordinator and your degree program advisors, the offices listed below are also available to help. Contact your university's academic support center for assistance and allow us to support you as you work to improve your performance.

**Sam Houston State University**

**SAM Center**

CHSS Rms 170 & 190

866.364.5211

[www.shsu.edu/centers/sam-center/](http://www.shsu.edu/centers/sam-center/)

**Texas A&M University**

**Academic Success Center**

9th Floor Rudder Tower

979.458.4900

[studyhub.tamu.edu](http://studyhub.tamu.edu)

**Texas A&M University at Galveston**

**Office of Academic Enhancement**

Seibel Center 2nd Floor Main Bldg

409.741.4343

[www.tamug.edu/slc](http://www.tamug.edu/slc)

**Texas Tech University**

**The Learning Center**

Holden Hall Room 80

806.742.3664

<http://www.depts.tt.edu/passcntr/PLC/>

**Texas State University**

**Student Learning Assistance Center**

Alkek Library 4th Floor

512.245.2515

[www.txstate.edu/slac](http://www.txstate.edu/slac)

**Texas Woman's University**

**Pioneer Center for Student Excellence**

Blagg-Huey Library 2nd Floor

940.898.3755

<https://twu.edu/pioneer-center/>

**University of Houston**

**UG Student Success Center - LAUNCH**

N109 Cougar Village I

713.743.5411

[www.uh.edu/ussc](http://www.uh.edu/ussc)

**University of North Texas**

**Learning Center**

Sage Hall 170

940.369.7006

[learningcenter.unt.edu](http://learningcenter.unt.edu)

**The University of Texas at Austin**

**Sanger Learning Center**

Jester Center room A332

512.471.3614

[ugs.utexas.edu/slc](http://ugs.utexas.edu/slc)

**The University of Texas at Arlington**

**Division of Student Success**

University Tutoring & Supplemental Instruction

Ransom Hall 205 - 817.272.2617

<https://www.uta.edu/studentsuccess>

**The University of Texas at Dallas****Student Success Center**

McDermott Library MC1.302

972.883.6707

[www.utdallas.edu/studentsuccess](http://www.utdallas.edu/studentsuccess)**The University of Texas at El Paso****Academic Advising Center**

Hawthorne St 1st Floor

915.747.5290

[www.utep.edu/advising/](http://www.utep.edu/advising/)**The University of Texas at San Antonio****Tomas Rivera Center for Student Success**

MS 1.02.02

210.458.4694

<https://www.utsa.edu/trcss/>***Scholar Contact Information***

You should regularly review your profile information to ensure that we have your most up-to-date information. You will receive emails from the Foundation throughout your college career, and these communications will frequently relate to important matters requiring your immediate response. *It is imperative that you check your email regularly and respond promptly when requested to do so.* You can update your profile, including contact information, online via the Terry Portal on the Foundation website ([terryfoundation.org](http://terryfoundation.org)).

You must notify the Foundation *immediately* of changes to your:

- 1) email address;
- 2) personal cell phone number;
- 3) current mailing address;
- 4) permanent address & phone number;
- 5) anticipated graduation date.

For questions or assistance concerning access to the Terry Portal, contact Brandy Skillern at the Foundation offices ([bskillern@terryfoundation.org](mailto:bskillern@terryfoundation.org); 713.552.0002 x206).

***Emergency Contact Designation***

The safety and well-being of all Terry Scholars is of the utmost concern to the Foundation. Each Scholar is required to provide an emergency contact and to update this information as needed.

The Terry Foundation reserves the right to contact a Terry Scholar's designated contact in the event of an emergency, and to share emergency contact information with police and medical professionals, as deemed necessary by Foundation personnel.

## ***On-Campus Housing Requirement***

### **Traditional Scholars**

Traditional Terry Scholars are required to live on campus during their freshman year. *Each university has a designated residence hall in which Traditional Scholars are required to reside for their freshman year.*

Following their freshman year, Traditional Scholars can choose to live off campus. Residing off campus can be significantly more expensive, and the scholarship amount set by the Foundation is based on the estimated cost of living on campus. *Your stipend will not be adjusted for any increase in housing costs incurred by choosing to live off campus.*

### **Transfer Scholars**

Transfer Scholars are NOT required to live on campus. The scholarship amount set by the Foundation for Transfer Scholars is based on each university's official off-campus cost of attendance.

## ***Mandatory Events for Scholars***

The Foundation hosts three events each year that all Scholars are required to attend.

1. **ORIENTATION.** At the beginning of each academic year, the Foundation hosts an orientation event at each of the universities for all current and incoming Terry Scholars. This event is in addition to any university- sponsored orientation Scholars may have already attended. At Terry Orientation, Scholars receive valuable information regarding the Terry Scholarship program, strategies for student success, and the Terry Scholar student organization on their campus. Scholars will also meet their Terry Campus Coordinator and their Scholar Relations Coordinator from the Foundation at this event. Every Terry Scholar is required to attend and participate.
2. **FALL BANQUET.** The Foundation hosts a formal dinner in the fall at each university for all currently enrolled Scholars. The dinner features presentations by Scholars, representatives of the Terry Scholar Student Organization, and an invited guest speaker. The dinner is preceded by a reception, during which all Scholars are photographed individually for the Terry Annual. The banquet is an opportunity for Terry Scholars to meet and interact with Terry alumni, Directors, Foundation staff, and other Scholars. The dress code for the event is professional business attire. Scholars are not required or expected to purchase special clothes for this event. Every Terry Scholar is required to attend and participate.
3. **SPRING PICNIC.** In late spring, all Scholars travel to a picnic where the accomplishments of graduating seniors are recognized. Terry Scholars attend with their university, and *must utilize the Foundation-provided transportation* to receive credit for attending the event. Every Scholar is required to attend and participate.

The Terry Foundation does not honor requests for family members, dates, or friends of Scholars to attend mandatory events. Our intention is that Scholars will spend their time at these events getting to know the Foundation's Directors and staff, the Terry Scholar Alumni, and each other.

Scholars are expected to show professional respect to program speakers. *Do not study or do other homework during Foundation events.* Do not text or use electronic devices during the event program and limit phone use in order to concentrate on in-person interaction.

*Your attendance at each of these events is mandatory. The dates for each of these events are published well in advance and are always available on the Foundation website. An unexcused absence from any of these events **may result in termination of your scholarship, and will incur, at minimum, one of the following probationary periods:***

Unexcused Absence	Mandatory Probation Period
Orientation	Entirety of fall semester
Banquet	Remainder of fall semester, <b>plus</b> entirety of spring semester
Picnic	Remainder of spring semester, <b>plus</b> entirety of fall semester

### ***Steps for Requesting an Excused Absence***

If you anticipate a conflict with any mandatory Terry event, you should first discuss with your Terry Campus Coordinator the merits of your request. If your on-campus coordinator indicates your request should then be reviewed by the Foundation, you should log into the Terry Portal to submit an *Excused Absence Request* (located under the *Actions* menu). Your *Excused Absence Request* should be submitted no later than one week prior to the event, unless the request arises from an emergency.

*An excused absence can only be granted by a member of the Foundation's Scholar Relations team; this decision will always be communicated to you in writing.*

### ***Scholarship Renewal Requirements***

A Traditional Scholarship funds a maximum of eight semesters of undergraduate education; a Transfer Scholarship funds a maximum of six semesters. The Terry Scholarship is renewable at the discretion of the Board of Directors. Renewal is automatic unless you are notified to the contrary.

To maintain the Terry Scholarship, and *in addition to any other academic or disciplinary requirements imposed by their universities*, Scholars must:

- complete full-time enrollment (at least 12 hours) each semester;
- maintain a cumulative grade point average of at least 2.5 each semester;
- achieve a semester grade point average of at least 2.0 each semester;
- comply in all respects with the university's code of conduct, the provisions of the Terry Scholar Handbook, and the Terry Foundation Scholarship Agreement;
- attend the mandatory events hosted by the Terry Foundation;
- submit an acceptable self-evaluation letter annually by the deadline; and
- maintain updated contact information with the Foundation.

If a Scholar's cumulative grade point average drops below 2.5, the student will be placed on probation for one semester and given the opportunity to bring the grade point average back into compliance. The Scholar will continue to receive the Terry Scholarship while on probation. If, at the end of the probationary period, the cumulative grade point average is still below 2.5, the Scholar will be terminated immediately from the Terry Scholarship program.

*If a Scholar earns a semester grade point average that is less than 2.0 in any semester, the student's scholarship will be terminated immediately, regardless of the Scholar's cumulative grade point average.*



## ***Requirement to Self-Report University Conduct Violations***

A Scholar who receives notice from their university alleging the Scholar's involvement in a student conduct violation (including allegations of academic dishonesty) is required to contact the Terry Foundation within seven (7) calendar days of receiving the initial notice. The Terry Foundation considers it the Scholar's responsibility to notify the Terry Foundation of the allegation(s) and to provide timely copies of all documents and correspondence between the university and the Scholar regarding the alleged student conduct violation(s) or academic integrity infraction(s) until the university reaches a final determination regarding the Scholar's conduct. A disposition resulting in sanction(s) from the university will mandate additional review of the Scholar's Terry program standing by the Terry Foundation.

Should it come to the Foundation's attention that a Terry Scholar has received notice and is under investigation by his/her Terry-affiliated university for student conduct violation(s) or academic integrity infraction(s) and the Scholar has failed to share this information with the Foundation, the Scholar's Terry Scholarship may be immediately terminated.

## ***Appealing a Scholarship Termination***

To appeal a scholarship termination, you must:

- 1) meet with the Terry Campus Coordinator at your university; and
- 2) submit your *Appeal Termination Request* under the *Actions* menu on the Terry Portal by the provided deadline. You must include a detailed statement describing your academic difficulties and your plan for correcting these problems in the coming semester.

You will receive notification in writing regarding the outcome of your appeal and, if your appeal is granted, any conditions imposed by the Foundation for continuing your scholarship. Terminated Scholars will have a limited window within which to request an appeal and should refer to their termination letter for the appropriate appeal deadline.

## ***Enrollment and Academic Progress Requirements***

Following acceptance of the Terry Scholarship, the Foundation requires Scholars to maintain full-time, continuous, in-person enrollment for each semester in which Terry funding is received. Failure to enroll for a fall or spring semester at your Terry-affiliated university without prior permission from the Foundation will result in the termination of your scholarship. Enrolling exclusively in online coursework or taking a majority of coursework online may result in termination of your Terry Scholarship funding (see Online Enrollment).

If your academic progress towards degree is delayed for any reason, including dropping classes for personal reasons; poor academic progress; or a change of major, and you have already received all six or eight semesters of funding from the Terry Foundation, *you will assume personal responsibility for funding your remaining semesters of undergraduate study.*

## ***Steps for Requesting Below Full-Time Enrollment***

All Terry Scholars must be enrolled full-time to receive their Terry Scholarship. Full-time enrollment is defined as at least 12 credit hours per semester of undergraduate coursework.

Scholars enrolling for their final undergraduate semester may request permission to enroll at below full-time status through the Terry Portal.

### **Dropping a Course**

If you wish to drop below full-time enrollment before a semester ends, you must submit an *Enrollment Change Request* through the Terry Portal to *request permission in advance of the drop*.

Any Terry Scholar dropping below full-time enrollment without advance written permission from the Foundation is in violation of the terms of their Terry Foundation Scholarship Agreement; as a result, your scholarship is subject to immediate termination at the Foundation's discretion. We recognize there are valid reasons why a Scholar may need to drop below full-time enrollment. *However, you must discuss your circumstances with your Terry Campus Coordinator and academic advisor (if appropriate) at your school and obtain written permission from the Foundation in advance of the drop.* Repeated enrollment at less than full-time status has serious adverse consequences for the timely completion of your degree and can jeopardize your timely graduation.

### **Requesting an Incomplete for a Course**

The Foundation prefers that you avoid taking "Incompletes" in your coursework. However, if you will take an Incomplete in any semester, you must contact your Terry Campus Coordinator as soon as feasible. Once your Terry Campus Coordinator has reviewed your request to take an Incomplete, we require you to submit an *Enrollment Change Request (Less Than Full Time Enrollment)* through the Terry Portal. Your request should include: your reasons for taking the Incomplete; the work you still have remaining in the Incomplete course; and the date by which you will complete the coursework. We ask that you finish all Incomplete work as soon as feasible, typically within 4-6 weeks of the end of the semester grading period. Incomplete courses impair our ability to review your progress and can delay your funding for future semesters.

## ***Online Enrollment***

The Terry Foundation scholarship is intended to fund enrollment for courses taught in-person, face-to-face, and requires Scholars to attend class on their Terry-affiliated university campus. For any Terry-funded semester of enrollment, Terry Scholars are actively discouraged from registering in online courses, and are required to maintain face-to-face enrollment requiring in-person, on-campus attendance in a majority of their enrolled coursework. Hybrid courses are considered online courses for the purposes of this requirement.

***Enrollment in online or hybrid coursework in excess of six credit hours per semester must be approved by the Foundation.*** Failure to adhere to these guidelines without prior permission from the Foundation may result in the termination of your Terry Scholarship. Requests to enroll in more than six credit hours of online or hybrid coursework will receive close scrutiny and must demonstrate that the Scholar has no other class format option available in which to complete the degree-required course work. To request permission to enroll in more than six hours of online or hybrid coursework, Scholars must submit an *Enrollment Change Request (Online Enrollment in Excess of 6 Hours)* under the *Actions* menu on the Terry Portal.

Scholars who intend to pursue or switch to online-only degree programs will forfeit their Terry Scholarship.

### ***Internships and Co-op Work***

If you accept an internship or a job under a co-op work arrangement approved by your university, your Terry scholarship can be deferred for up to one year while you complete the internship or co-op work period. You will not receive your scholarship during this period, and the internship/co-op semester will not count against your six or eight semesters of scholarship funding. To defer funding while pursuing an internship or cooperative work semester, submit an *Enrollment Change Request (Defer Terry Stipend)* under the *Actions* menu on the Terry Portal.

You may request funding during an internship or co-op semester if you are co-enrolled. To receive your stipend during this period, submit your request in advance through the *Special Funding* option under the *Actions* menu on the Terry Portal. A Terry Scholarship used to fund a co-op or internship period will count as one of your semester stipends.

## ***Requesting Special Funding (Summer School, Study Abroad, or Extended Funding)***

If you wish to request Special Funding for an upcoming semester, please follow these steps.

- 1) Gather information regarding your proposed plan of study and draft a letter that clearly defines what you plan to do, the credit you will earn, and how that credit will ensure your timely progress towards graduation;
- 2) Discuss your request with your Terry Campus Coordinator. This is your opportunity to ensure that your request is not only appropriate, but appropriately presented, prior to contacting the Foundation; and
- 3) Submit your *Special Funding Request* under the *Actions* menu in the Terry Portal.

### **Summer School**

If you decide to attend summer school to maintain your academic degree progress and ensure a timely graduation, the Foundation, on a case-by-case basis, may allow you to use your scholarship to attend summer school. You must enroll in a full-time course load in the summer for which you request funding; the summer school semester will count as one of your six or eight semesters of funding.

*In general, the Foundation only encourages use of the scholarship for summer school when it is apparent that attending summer school will clearly and positively impact the student's academic progress toward graduation.*

Submit your *Special Funding Request (Summer School)* under the *Actions* menu on the Terry Portal.

### **Study Abroad**

Terry Scholars in good standing who meet the criteria outlined below can qualify to receive a one-time Study Abroad stipend in the amount of \$5,000. The \$5,000.00 stipend is in addition to a Scholar's typical allotment of 8 (Traditional) or 6 (Transfer) semesters of funding. The \$5,000 stipend can be used for an approved Study Abroad program of between two and fourteen weeks in length in which a minimum of 3 semester credit hours of transferable credit are earned towards the Scholar's degree.

Scholars who request to use a study abroad stipend must satisfy the following criteria:

**Terry Persistence Requirement** - Scholars cannot utilize a Terry study abroad stipend until the Scholar has completed an academic year (two long semesters) in the Terry Scholarship program. Scholars wishing to study abroad during the summer following their first year in the Terry scholarship program may submit their request for study abroad funding after the start of the spring semester.

**Academic Standing Requirement** - Terry Study Abroad funding is available only to students with a cumulative grade point average of at least 3.0 and a semester grade point average of at least 2.5, and whose status with the Foundation is "good standing." These conditions must be met both at the time of request and at the time funds are disbursed to receive the Terry study abroad stipend. A Scholar who is "on probation" is not in good standing, and cannot either request or utilize a Study Abroad stipend while they are on probation with the Foundation.

**Timely Graduation Requirement and Positive Degree Impact** - Scholars who meet the Persistence and Academic Standing requirements must utilize their Terry Study Abroad stipend *prior* to their last semester of undergraduate Terry funding.

For the fall and spring long semesters, Scholars may request to use one of their regular Terry stipends *in conjunction with* the \$5,000 Study Abroad stipend. In addition to meeting the requirements above, Scholars must participate in a program of at least 12 weeks in length and earn a minimum of 12 semester credit hours.

Study Abroad stipend amounts will not increase to meet any additional costs required or incurred by the Scholar while participating in the study abroad program. *Study Abroad payments due prior to the university's disbursement date are the Scholar's responsibility. Scholars are expected to plan carefully and to save in anticipation of self-funding required payments.*

Scholars should research their program options carefully, and choose a study abroad program that is either sponsored by or affiliated with the Scholar's Terry university. Scholars must earn a minimum of *three transferable credit hours, applicable to the Scholar's degree*, through their chosen program.

"Affiliated" Study Abroad programs that require enrollment through a university other than the Scholar's Terry university can present additional funding constraints. Scholars should confer with either the Terry Campus Coordinator or the campus Study Abroad office to determine whether utilizing a Terry Study Abroad stipend is suitable for these programs. Scholars who participate in affiliated programs are required to complete all paperwork necessary to ensure that credit earned from the affiliated program appears on the Scholar's Terry university transcript. All credit should post to the Scholar's Terry university transcript within one year from the study abroad program's start date.

Domestic study programs (within the continental United States) are not eligible for Study Abroad funding.

Other outside aid awarded to the Scholar designated for studying abroad will *not* impact the amount of the Terry Study Abroad stipend. However, the Terry Study Abroad stipend *can* affect other financial aid and scholarship awards you receive. We recommend that Scholars confer with the Terry-designated financial aid officer on their campus regarding the potential impact of using the Terry Study Abroad stipend prior to finalizing plans.

The *Special Funding* request for study abroad should be submitted under the *Actions* menu on the Terry Portal ([terryfoundation.org](http://terryfoundation.org)) by the Foundation's stated deadline. *No late or incomplete requests can be considered.* The request must include:

- the total number of credit hours the Scholar expects to earn;
- how the courses will apply to their degree;
- the Scholar's program dates abroad;
- the location(s); and
- the approval letter for the study abroad program.

**Study Abroad Contract** - Scholars who receive initial approval for Study Abroad funding will acknowledge and agree to the following stipulations prior to receiving final approval and funding:

1. I understand that my Study Abroad funding is conditional, and will be revoked if I do not meet the GPA and good standing requirements for the semester immediately prior to my Study Abroad trip. This means that my Terry Study Abroad funds can be revoked even if my trip has already begun.
2. I understand that I am personally responsible for any Study Abroad program-related costs due prior to the disbursement of my Study Abroad stipend by my university.
3. Should any of the circumstances under which my Terry Study Abroad stipend was awarded change, I am obligated to share this information with the Foundation as soon as possible. These circumstances include, but are not limited to:
  - a. any change in my enrolled or earned number of hours;
  - b. any event that substantively affects the length of my proposed trip.
4. If I fail to provide to the Foundation information regarding changed circumstances in a timely manner, I may be required to return the full amount of the Terry Study Abroad stipend to the Foundation.

### **Extended Funding**

The Foundation's objective in providing Extended Funding is to assist current Scholars in the completion of their initial undergraduate degree. *Extended Funding is not intended to fund graduate study.*

Extended Funding from the Terry Foundation is available to Scholars whose undergraduate *degree plans require more than the typical eight semesters of study or require in excess of 128 credit hours*. Terry Scholars whose degree programs require 128 or 129 total hours can apply for one semester of Extended Funding; Scholars whose programs require 130+ total hours may apply for an additional two semesters of funding.

Extended Funding is available only to Scholars with a cumulative grade point average of at least 3.0 as of the end of their 7<sup>th</sup> semester (Traditional) or 5<sup>th</sup> semester (Transfer) of Terry funding.

Extended funding is not automatic and is reviewed on a case-by-case basis.

Programs of study that do NOT qualify for Extended Funding:

- Programs resulting in two undergraduate degrees, such as dual major programs;
- Programs incorporating multiple minors;
- Joint programs and 3+2 programs, in which the student concurrently earns both a bachelor's degree and an advanced degree;
- Programs of study that require more than five years to attain the initial degree.

Following a meeting with their Terry Campus Coordinator regarding their Extended Funding Request, Scholars should submit a *Special Funding Request (Extended Funding)* under the *Actions* menu on the Terry Portal at the end of their 7<sup>th</sup> or 5<sup>th</sup> semester of funding. This request must include:

- The total number of hours required by the Scholar's current degree program;
- the number of hours remaining to complete the degree program;
- the Scholar's enrollment plan; and
- a copy of the Scholar's degree plan or audit.

Review of requests for Extended Funding will take place following receipt of the Scholar's seventh or fifth semester grades.

The Foundation's decision on Extended Funding requests is final.

Scholars receiving Extended Funding are considered Terry Scholars for all purposes and must attend mandatory events and comply with the Foundation's rules and procedures throughout the Extended Funding period.

### ***How Your Terry Scholarship is Determined – Traditional Scholars***

Traditional Scholars are awarded variable stipends based on the university's official on-campus cost of attendance and other financial awards received for the academic year (including scholarships, grants, waivers, savings plans, etc.).

#### **Reporting Changes in Financial Circumstances**

Traditional Scholars are required to notify the Foundation and the university's financial aid office of any scholarships or other financial awards received in addition to your Terry Scholarship. The sooner your university financial aid office is aware of **all** awards (scholarships, grants, waivers, and exemptions) available to you each year, the sooner you will know the exact amount of your Terry Scholarship.

Scholarships and financial need are complicated matters. If you have questions, please contact your Terry Campus Coordinator and/or the designated Terry financial aid officer at your university for help. If your university representatives cannot resolve your question, or if there is a significant change in your family's financial circumstances, email your Scholar Relations Coordinator at the Foundation.

#### **Outside Aid Review (OAR)**

Each summer, Traditional Scholars will receive an email from the Foundation with instructions to log into the Terry Portal to update their scholarship and financial aid awards. To complete the Outside Aid Review, Scholars will review and update a list of all outside scholarships and financial aid to be received in the coming academic year, adding any new awards. *It is imperative that Scholars complete and submit this information through the Terry Portal by the specified deadline, as the Foundation cannot fund a scholarship for the coming fall until the Scholar's completed OAR has been submitted, reviewed, and finalized.*

Any changes to a Scholar's outside aid following this annual submission must be emailed to the Scholar's designated Scholar Relations Coordinator at the Foundation. The email should include the name, amount, and duration of the award (one time or renewable).

## Obligation to Disclose 529/Texas Tomorrow Funds and Option to Defer

All Scholars have an obligation to disclose to the Foundation any account balances that they or their family members may hold in a college savings plan, such as a 529 plan or Texas Tomorrow Fund (TTF). Disclosure is achieved when the Scholar lists the 529 plan or TTF balance as part of the Scholar's Outside Aid Review. The Foundation assumes that the Scholar and/or their family intend to use a portion of these funds each year (up to one fourth of the account balance annually), to help fund the Scholar's undergraduate education.

Following disclosure, a Scholar may request to defer their use of an available 529 plan or TTF savings plan to another family member, or use the funds towards graduate school. Scholars who wish to defer the use of these funds *must request permission from the Foundation to do so, in writing, and in advance*. Scholars should submit their request to defer use of any college savings plan when they complete the Outside Aid Review in the Terry Portal. In the alternative, Scholars should email their designated Scholar Relations Coordinator at the Foundation as soon as feasible, but no later than August 1<sup>st</sup>, for requests affecting upcoming academic year funding.

If you have any questions regarding your 529 plan or TTF, you should contact the financial institution at which your account is held or a professional financial advisor. Foundation staff cannot answer your questions or provide financial advice regarding these accounts.

## FAFSA Completion Requirement

Traditional Scholars are required to complete a Free Application for Federal Student Aid (FAFSA) each year and respond quickly to any requests for verification from the university. *Completing a FAFSA is required by the Foundation even if you do not expect to qualify for any federal grant funding.* The Foundation will not fund a Traditional Scholar's scholarship for the coming school year until the FAFSA is submitted and all verification requests are complete.

Traditional Scholars are encouraged to file the FAFSA as early as possible ([www.fafsa.gov](http://www.fafsa.gov)). Scholars who have not filed by July 1<sup>st</sup> may lose funding for one or both semesters of the academic year. Failure to file the FAFSA by November 1<sup>st</sup> will result in the immediate termination of your Terry Scholarship.

**NOTE:** the 2020-2021 FAFSA will open online as of October 1, 2019, and will utilize 2018 income tax information to determine eligibility for financial aid awards. In addition to filing your FAFSA early, it is equally important to respond quickly to any requests for verification from your university and to meet your university's financial aid priority deadline. If you delay in filing, you may not qualify for some grants and other need-based aid.

## How Your Terry Scholarship is Determined – Transfer Scholars

Transfer Scholars are awarded a Terry scholarship of a fixed amount, calculated to cover up to 65% of the university's official off-campus cost of attendance each year. Transfer Scholars are not required to report external awards to the Foundation. However, you should be aware that the amount of your Terry Scholarship, including the optional Study Abroad stipend, can impact your eligibility to receive other forms of financial aid, such as grants.

Transfer Scholars are strongly encouraged to complete a FAFSA each year ([www.fafsa.gov](http://www.fafsa.gov)), but are not required to do so. In addition to filing your FAFSA early, it is equally important to respond quickly to any requests for verification from your university and to meet your university's financial aid priority deadline. If you delay in filing, you may not qualify for some grants or other need-based aid.

**NOTE:** the 2020-2021 FAFSA will open online as of October 1, 2019, and will utilize 2018 income tax information to determine eligibility for financial aid awards.



## *Availability of Scholarship Funds*

The Terry Foundation sends scholarship funds to each university prior to the beginning of each semester. The financial aid office at your university releases scholarship funds in accordance with their scholarship disbursement procedures. Since the Foundation does not control these procedures, you should direct any questions regarding the timing of your receipt of Terry Scholarship funds to your Terry Campus Coordinator or the designated Terry financial aid officer at your university.

## *Your Terry Scholarship and the IRS*

Under current tax law, certain portions of grants and scholarships *may* be taxable as income. All recipients of Terry Scholarships should obtain Internal Revenue Service Publication 970, Tax Benefits for Education (or its equivalent) each year to determine if any part of their award should be included as taxable income. You can obtain this publication at <https://www.irs.gov/forms-instructions>. We also encourage you to review the *Guide to the Tax Treatment of Scholarships*, available in the Reference section of your Terry Portal.

Our understanding of current tax law is that any portion of your total grants and scholarships not used for tuition, fees, books, and *required* supplies is taxable as income. To assist with this calculation, your university will provide you annually with a 1098-T form. The 1098-T verifies the amount paid by you to the university in tuition and required fees for the calendar year. In addition, IRS Publication 970 contains worksheets that can help you determine the potential taxability of any part of your financial aid and scholarships.

We recommend saving your receipts throughout the year for all tuition and fee bills, as well as receipts for all *required* supplies. Supplies must be required by an instructor to be considered deductible. Room and board expenses are not considered deductible. You may use your scholarship funds for these expenses, but you should remember that this portion of your scholarship may be considered income for tax purposes.

If you have any questions about the tax status of your scholarship, you should contact the IRS or a professional tax preparation expert. Neither the Foundation nor the financial aid office at your university can answer questions or provide advice regarding tax matters.

## *Leave of Absence*

Once you have begun studies at your university as a Terry Scholar, we expect you to be physically in attendance each consecutive semester, except summers, until you utilize all six or eight semesters of your Terry scholarship, or complete your degree, whichever comes first.

If you take time off (other than summer), without Foundation permission, your Terry Scholarship is terminated, and the Foundation does not guarantee the availability of your scholarship should you return to school. School-approved activities such as study abroad, a co-op work semester, or an internship that does not last longer than one year, are excluded from this provision.

If extraordinary circumstances necessitate your leaving college for a period of time, you may request a Leave of Absence from the Terry Foundation.

To request a Leave of Absence, log in to the Terry Portal, using the *Enrollment Change Request (Deferral)* function on the *Actions* menu. Include the reasons why you need to leave school, how long you will be away, and when you plan to return. If your request is granted, you will receive a written response detailing the conditions of your reinstatement for your Terry Foundation Scholarship.

## ***Early Graduation***

**NOTE:** *the information contained in this section applies only to Scholars who began participating in the Terry Scholarship Programs prior to the fall of 2018.* Starting with fall 2018 entering Scholars, the Terry Foundation will no longer approve the use of remaining stipends for graduate study, and will discontinue our funding upon the Scholar's completion of their undergraduate degree, regardless of the number of stipends utilized by the Scholar during their time in the Terry Scholarship Program.

Scholars who began participating in a Terry Scholarship program prior to fall 2018 should understand that funding for post-graduate study is not guaranteed beyond completion of an initial undergraduate degree. Requests to use remaining stipends for graduate study will be reviewed on a case-by-case basis. Any Scholar who is granted permission to utilize a Terry stipend for graduate study must meet the Foundation's requirement of continuous enrollment. *Scholars who wish to defer their Terry Scholarship for a semester prior to entering graduate school do not meet the Foundation's requirement of continuous enrollment.* Exceptions can be considered in those instances in which a program of study has only one annual start date.

Scholars hoping to utilize a Terry stipend to attend graduate school must demonstrate serious intent to pursue post-graduate study, and must provide the following to the Foundation during the Scholar's final undergraduate semester:

- identified program of study,
- the name of the Terry-affiliated institution,
- the Scholar's student ID number at the new university;
- completion of required entrance exams,
- date of program start, and
- letter of admission.

Providing this information is not a guarantee of funding. If you anticipate early graduation from your degree program, we recommend that you speak with your Terry Campus Coordinator and/or Scholar Relations Coordinator at the Foundation regarding your options.

## ***Request to Transfer Your Terry Scholarship to Another Terry School***

Terry Scholarships can only be transferred to participating Terry-affiliated Texas public universities.

Traditional Scholars must use their Terry Scholarship at the university for which they interviewed during their initial year in the Terry Scholar program. Following the completion of the initial year, Traditional Scholars may elect to use their Traditional Scholarship at any Terry-affiliated institution. This request to transfer requires that the Scholar is in good standing with their Terry Scholarship; meets all requirements for admission to the new institution; can provide documentation that the transfer will ensure the Scholar's timely progression to degree at the new institution; and provides, in writing, timely notification to the Foundation of the requested change.

Transfer Scholars may use their Terry Scholarship at any Terry-affiliated university, beginning with the student's initial year in the Terry Scholar Program. Transfer Scholars who wish to transfer after their first year as a Terry Scholar must meet all admission requirements for the new institution; provide documentation that the transfer will ensure the Scholar's timely progression to degree at the new institution; and request, in writing, to transfer the remaining semesters of funding to the new Terry-affiliated university.

All Requests to Transfer should be submitted to the Foundation via email, and addressed to the Scholar's designated Scholar Relations Coordinator at the Foundation.

### ***Self-Evaluation Letter (SEL) Requirements***

By June 1st of each year, every Terry Scholar is required to submit a self-evaluation letter to the Foundation. In this letter, each Scholar should:

- 1) discuss the Scholar's level of achievement in the goals set the previous year;
- 2) establish goals for the coming year;
- 3) describe the specific steps the Scholar will take to meet each of those goals.

These letters are not "graded," but they are read carefully by the Board of Directors, members of the Advisory Board, and Foundation staff. Scholar Relations Coordinators will counsel Scholars whose letters are considered unsatisfactory.

The timing and content of Scholar self-evaluation letters are discussed in the Guidelines for Preparing the Mandatory Self-Evaluation Letter. Review these guidelines carefully. Submissions which do not conform to the directives *in the guidelines will be returned for revision and re-submission.*

## ***GUIDELINES FOR PREPARING THE MANDATORY SELF-EVALUATION LETTER***

### **1. What is the purpose of the self-evaluation letter (SEL)?**

The primary purpose is to encourage Scholars to develop the habit of setting goals, outlining specific plans to achieve those goals, and evaluating whether the goals have been achieved, and if not, why not. In addition, these letters enable Directors, Advisory Board members, and staff to keep up with what each Scholar is doing on an ongoing basis. Many Scholars have told us that this simple exercise is one of the most beneficial parts of the Terry Scholar Program.

### **2. What should my letter contain?**

Generally, the letter must include some specific goals for the coming year (both academic and non-academic), and outline an action plan for how you intend to meet those goals. In addition, if this is not your first SEL, you should review the goals you set in your prior letter and candidly evaluate how well you achieved those goals. If you failed to meet certain goals, the SEL should include a discussion of why and how you intend to improve. Many Scholars describe the activities in which they participated during the school year and tell us about awards they received or leadership roles they assumed. Some also tell us a little about their summer plans.

It is very important that you place at the top of the first page of your letter your full name, the **first** year that you were a Terry Scholar, the university you are attending, and the date. Letters without the proper identification will not be accepted and will be returned.

#### ***Example:***

##### ***Your name***

*First Year as a Terry Scholar/Your University  
June 2020 Self-Evaluation Letter*

##### ***Joe T. Scholar***

*2018 Scholar – University of Terry  
June 2020 Self-Evaluation Letter*

#### ***Include an appropriate salutation to begin your letter:***

*Dear Terry Foundation:*

### **3. What should NOT be in a self-evaluation letter?**

Please do **not** put in your SEL information about changed financial circumstances or scholarships that have been supplemented or lost. These types of communications are important but do not belong in this letter; instead, this information should be shared with your Scholar Relations Coordinator in a separate email.

Do not include in your letter changes in contact information. To notify the Foundation of address or phone changes, navigate to your Scholar profile in the Terry Portal and update the appropriate data fields with your new information.

### **4. How long should my self-evaluation letter be?**

Your letter should be between 500-1000 words. You should organize your thoughts and strive to be as concise as possible.

**5. Is any particular format required?**

Letters must be typed or pasted into the Self-evaluation Submission Form on the Terry Portal. All letters must include a header and a salutation. We ask that you reread and proof your letter for grammatical and spelling errors prior to submission.

**6. Are graduating seniors required to submit a letter?**

No. Although graduating seniors (or Scholars who have completed the program's six or eight semesters of funding) are not required to submit an SEL, Foundation personnel certainly enjoy hearing from you.

**7. Will I receive a response to my letter?**

Yes. You will receive an automatic response when your letter is received. Once your letter has been reviewed, you will receive a notification to access your reviewer's comments by logging into the Terry Portal and clicking on the appropriate hyperlink in the Terry Messages Inbox. We expect all Scholars to have read their reviewer's comments prior to the annual Terry Orientation.

**8. When is the letter due?**

Self-evaluation letters are due no later than June 1st of each year during which you receive funding from the Terry Foundation.

**9. Where do I submit the letter?**

SELs are submitted using the Terry Portal. On or around May 1<sup>st</sup> of each year, you will receive an email instructing you to log into the Portal to submit your letter. The self-evaluation submission form is not available until you receive this notification. If you need to submit your SEL early (prior to receiving your annual SEL email notification), please email your Scholar Relations Coordinator for assistance.

## GUIDELINES FOR USING TERRY CONNECT

### 1. What is Terry Connect?

Terry Connect is a networking platform exclusively for Terry Scholars. Current students and Alumni can use the platform to:

- Offer and seek help with resume review, mentorship, and professional introductions
- Search for and connect with fellow Terrys based on major, career fields, etc.
- Find and post job and internship opportunities
- Learn about and sign up for events hosted by the Foundation, student organizations, and Alumni chapters

Terry Connect is a great tool for Terrys at any stage of their educational or professional journeys, and using this platform strengthens our Terry family by facilitating relationships across schools and Terry Scholar classes.

All Terry Scholars are automatically granted Terry Connect accounts and can activate them at any time by using Google, Facebook or LinkedIn.

To access Terry Connect, visit **terryconnect.com** or download the Terry Connect app for Apple or Android devices (instructions at [terryfoundation.org/connect](http://terryfoundation.org/connect)).

### 2. Why should I activate my Terry Connect profile?

Your profile helps other Scholars get to know you and learn about your interests and areas of expertise. **We recommend completing as many fields as possible.**

#### Example Profile:

The screenshot displays a user profile for Franco Martinez. On the left, there is a circular profile picture of a man with glasses. To the right of the picture, the name 'Franco Martinez' is displayed in bold, followed by his title 'Scholar Relations Coordinator' and affiliation 'The Terry Foundation' and 'Foundation Staff'. Below this is a 'MESSAGE' button. To the right of the profile picture is a calendar icon. Below the profile information, there are three sections: 'Terry Foundation Education' listing 'UH, 2005, M.Ed. - Master of Education, Education Administration'; 'Experience' listing 'January 2016 - June 2018' at 'The Terry Foundation' as 'Scholar Relations Coordinator' in 'Higher Education'; and 'Franco's Location' showing 'Houston, Texas, United States' with a map of the Houston area. On the right side of the profile, there are two call-to-action boxes. The first is 'Ask Franco For Help' with a list of interests: 'Willing to answer industry specific questions', 'Willing to introduce others to personal connections', and 'Willing to speak at Terry student group or alumni meetings', with a 'Request help' button. The second is 'Ask Franco To Be Your Mentor' with a list of interests: 'Offer graduate school advice', 'Review resume', 'Offer professional field advice', and 'Willing to meet for a chat over coffee', with a 'Request mentoring' button.

**Franco Martinez**  
Scholar Relations Coordinator  
The Terry Foundation  
Foundation Staff  
[MESSAGE](#)

**Terry Foundation Education**  
UH,  
2005,  
M.Ed. - Master of Education,  
Education Administration

**Experience**  
January 2016 - June 2018 • The Terry Foundation  
Scholar Relations Coordinator  
Higher Education




**Franco's Location**  
Houston, Texas, United States

**Ask Franco For Help**  
Willing to answer industry specific questions  
Willing to introduce others to personal connections  
Willing to speak at Terry student group or alumni meetings  
[Request help](#)

**Ask Franco To Be Your Mentor**  
Offer graduate school advice  
Review resume  
Offer professional field advice  
Willing to meet for a chat over coffee  
[Request mentoring](#)

### 3. How do I get started?

When you create your profile at **terryconnect.com**, you will be asked to provide information about yourself. **Information about your Terry university and award year are mandatory**, but we recommend completing as many fields as possible (major, highest degree earned, career or primary specialization, work history, grad school, etc.)

	Terry Foundation	▼
	Terry University	▼
	Scholarship Award Year	▼
	College Major(s)	▼
	Highest Degree Earned	▼
	Career or Primary Specialization	▼
	Work Experience	▼
	Other Education	▼

You will also be able to indicate the ways you would like to offer and seek help.

#### Mentoring Settings



##### Offer Help

- ☒ Willing to answer industry specific questions
- ☒ Willing to introduce others to personal connections
- ☒ Willing to speak at Terry student group or alumni meetings
- ☒ Willing to share information about the Terry scholarship at high schools and colleges

##### Seek Help

- ☐ Willing to answer industry specific questions
- ☐ Willing to introduce others to personal connections
- ☐ Willing to speak at Terry student group or alumni meetings
- ☐ Willing to share information about the Terry scholarship at high schools and colleges



##### Offer Mentoring

- ☐ Offer graduate school advice
- ☒ Review resume
- ☒ Offer professional field advice
- ☒ Provide internship opportunities
- ☒ Provide shadowing opportunities
- ☒ Willing to meet for a chat over coffee

##### Seek Mentoring

- ☐ Offer graduate school advice
- ☐ Review resume
- ☐ Offer professional field advice
- ☐ Provide internship opportunities
- ☐ Provide shadowing opportunities
- ☐ Willing to meet for a chat over coffee

#### 4. How do I find a mentor on Terry Connect?

##### Filter People By

First name

Last name

Affiliation

Location



Get Involved



Mentoring



Terry Foundation



Work Experience

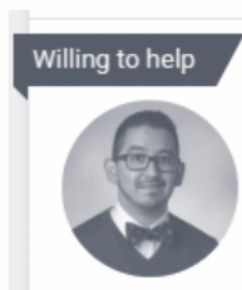


Other Education

Potential mentors have indicated the ways that they are able and willing to help their fellow Terrys. You will be able to search the directory using many criteria, including: type of mentorship desired, location, major, graduate field, career specialization, and more.

Once you receive your search results, you can then send mentor requests and messages to the Terrys who best meet your search criteria.

**If a Terry is willing to be contacted for help or mentoring, that person will have a profile badge that looks like this:**



#### *What is the difference between a message and a help/mentoring request?*

Messages are meant for general communication. You can send a message to any user who allows this feature by clicking the message button at the top of their profile.

MESSAGE

You can also request a meeting with certain Terrys. If someone is willing to meet with fellow Scholars, they will have a calendar icon under the message button. Selecting this icon opens a scheduling tool that allows you to request a phone call, in-person meeting, Skype call, or Google Hangout.



A **help/mentor request** is more formal and will create a link between your profile and the profile of the person you are contacting. You can find the help/mentorship request buttons on the right side of a user's profile, if they are willing to be contacted.

***Please do not contact fellow Scholars to request help or mentorship if they have not indicated that they are willing to help. Similarly, do not contact someone to request help with something that they have not included on their help/mentoring choices.***



Ask Franco For Help

Willing to answer industry specific questions  
Willing to introduce others to personal connections  
Willing to speak at Terry student group or alumni meetings

Request help



## 5. I have found a potential mentor, now what?

Before reaching out to Terry Scholar Alumni on Terry Connect, you should navigate to **terryfoundation.org/connect** and consult the information provided. You owe yourself and any Scholar Alumni whom you might contact the benefit of thorough preparation. Utilizing this information will increase your confidence, save you time, and ensure successful outreach efforts.

Resources on the website include:

- Recommendations for making the best possible first impression;
- Strategies for requesting and conducting a meaningful and productive informational interview;
- Example icebreaker, school, and career questions;
- Sample correspondence from Terry Scholars and Alumni

When you are ready to send a request, navigate to the appropriate profile and select either “request help” or “request mentoring.”

The image displays two screenshots from the Terry Connect website. The left screenshot shows two buttons: 'Request help' and 'Request mentoring'. The right screenshot shows the 'Request mentoring' form, which includes a dropdown menu to select the type of mentoring (e.g., 'Request mentoring', 'Offer graduate school advice', 'Review resume', 'Offer professional field advice', 'Willing to meet for a chat over coffee') and a 'SEND' button.

**Ask Franco For Help**

Willing to answer industry specific questions  
Willing to introduce others to personal connections  
Willing to speak at Terry student group or alumni meetings

**Request help**

**Ask Franco To Be Your Mentor**

Offer graduate school advice  
Review resume  
Offer professional field advice  
Willing to meet for a chat over coffee

**Request mentoring**

**You will then be asked to indicate what specific type of help or mentoring you need.**

**Ask Mentoring From Franco**

Please select the type of mentoring you would like to receive  
Request mentoring

Write your message to Franco. Please include some background about yourself as well as a clear explanation of how you would like help.

**SEND**

**Ask Mentoring From Franco**

Please select the type of mentoring you would like to receive  
Offer graduate school advice  
Review resume  
Offer professional field advice  
Willing to meet for a chat over coffee

**SEND**

**You should ALWAYS include a greeting in your mentor request. Do not leave the message section blank.** Include your major(s), your goals/ desired career field, and your specific reason for reaching out. Be sure you give the recipient time to respond before following up. Some people have very busy schedules and may take a few days or more to see and consider your request.

Visit **terryfoundation.org/connect** for tips on writing professional introductions.

## 6. What is expected of me when I use TerryConnect?

Scholars are required to abide by the following guidelines when using Terry Connect:

- Terry Connect is for use by Terry Scholars ONLY, and its contents may not be shared **and** the personal information contained cannot be used for commercial purposes, solicitation, or mass communications of any kind.
- Each Terry Scholar will conduct oneself in a professional manner when contacting Terry Connect Mentors and other Terry Connect users.
- Each Terry Scholar will respect Terry Connect Mentors' time as working professionals and will employ patience and understanding, as some Alumni may be able to invest more time than others.
- Each Terry Scholar will refrain from asking any Terry Connect Mentor or other user for special consideration or favors due to shared status as Terry Scholars.
- Each Terry Scholar must refrain from asking a Terry Connect Mentor or other user for a job or inside information regarding open positions within his or her company, unless this is something they have explicitly stated in their profile.
- All Terry Connect users pledge to inform the Foundation immediately upon observation that Terry Connect is being used inappropriately.

**Inappropriate use of Terry Connect will result in suspension of your account.**

To access Terry Connect, please visit  
**terryconnect.com** or download the mobile app.

For additional tips and guidelines for networking,  
please visit **terryfoundation.org/connect**.