



1. Is it the TRUTH?
2. Is it FAIR to All Concerned?
3. Will it Build GOODWILL and Better Friendships?
4. Will it Be BENEFICIAL to All Concerned?

ORGANIZING A 4-WAY TEST MERIT AWARD/SCHOLARSHIP PROGRAM

Becoming A Scholarship Sponsor

By Caryl Lynn Cusick
2006 edition



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ORGANIZING A 4-WAY TEST MERIT AWARD-SCHOLARSHIP PROGRAM

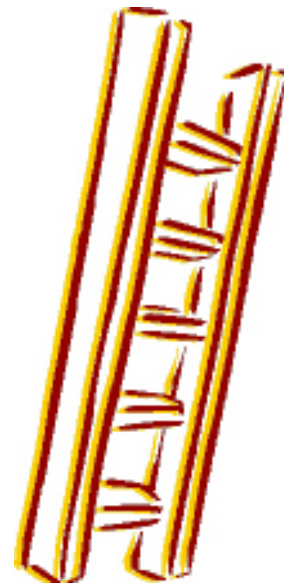
The following outline and sample forms are designed to facilitate your setting up a 4-Way Test Merit Award or Scholarship Program in your community.

Introduction:

In today's society we continually stress the value of higher education as a passport for moving up the "ladder of success". However, this "ticket" has become increasingly expensive. And, in the 21st Century it has exploded having risen over the past two decades at twice the rate of inflation.

With the "Information Age Superhighway" in **eager bloom**, this emphasis on skilled technical expertise whether in the fields of science, communications, economics or the arts has underlined the need for an educated public. The growth of service based businesses in the United States has created a demand for educated employees with well-honed decision making skills.

The new technology is requiring a new hierarchy in business - a less bloated bureaucracy, with important decisions being made not just at the top, but more quickly at all stages of the so called "corporate ladder." Business is becoming more massive on the one hand (world encompassing corporations like McDonalds, Wal Mart, Coca Cola, Citicorp) and leaner on the local level with small business owners using their computers to do many tasks in-house they formerly couldn't. **Multi-skilled employees are in greater demand. Affability, brains, brawn and beauty are tooted - all in one!**



But none of this would be enough without the all-important "C" -



- **Character!** The development of good character is needed for an effective decision making environment throughout not only an organization, but in the home and in our communities.

Recognizing this need for Character (not Crime) as the underpinning of society, a 4-Way Test Scholarship program can benefit, encourage, and recognize individuals whose talent, participation, and leadership in our Nation's future growth is desperately needed.



Your 4-Way Test Scholarship Program can put a needed emphasis on what higher education -- learning our ABC's is all about, *really!*

And its not that hard! **You can elect to be a sponsor and choose an administrator of the program.** *A sponsor is an organization funding the program and setting the requirements. The administrator can be a high school, college, or another umbrella organization responsible for conducting the program and reporting back to the sponsor.*

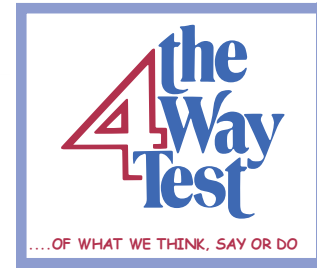
Your commitment will make a difference in the caliber of leadership found among our youth as we explore a new century.

Getting Started:



1. Decide the basics of how your scholarship program will be funded: From whom or how to collect
 - A. **Capital (principal)** used each year to directly fund that year's scholarships.
 - B. **An endowment** whereby money is collected from various sources annually and invested. The Invested portion grows with time and interest/dividends (not principal) are used annually to fund the scholarship.
 - C. **A combination of principal/earnings** from investments used on a percentage basis to fund your scholarship annually. This is perhaps the easiest way to start funding an ongoing annual scholarship.

The first year, perhaps a 50/50 split (50% funds invested, 50%



directly given as scholarship money until your invested portion becomes large enough so that you can use only the interest/dividends to fund the scholarships.

2. **Suggested sources for funding:**

A. **Fund raising activity** such as an auction, sale of product or services, social event, athletic event, or raffle.



B. **Cash donations** from individuals and/or businesses.

C. **A non-profit foundation** you set up to funnel monies for which you request planned gifts in the form of:

(1) Will Bequest contributions (percentage, residuary, specific or contingent)

(2) Life Insurance Beneficiary contributions

a. Name foundation as owner/beneficiary or as co-beneficiary of new or existing policy.

b. Give proceeds from new or existing policy to the foundation, but reserve income for survivor.

(3) Charitable Remainder Trust contributions (assets from trust pass to foundation upon death of last surviving beneficiary or expiration of preset term of years terminating the trust).

a. Annuity Trust (fixed payments given to beneficiary each year even if necessary to use principal).

b. Unitrust (percentage value paid to beneficiary each year based on current year value of trust).

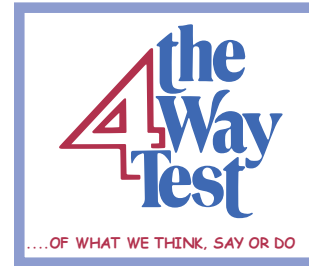
(4) Charitable Gift Annuity contributions (in exchange for gift, foundation guarantees annual income to one or more people identified by donor).

3. **Setup a program for recognizing contributors to scholarship funds.**

A. Designate different levels of giving with corresponding certificates of recognition.

B. Recognize donors at each contribution





level in some sort of brochure or letter each year. Publicize this information for the general public's purview.

4. Scholarship Requirements

A. Decided how many and how much each scholarship will be (\$500 - \$1,500 or more) annually and determine whether or not it will be renewable until completion of senior year at college.

B. If renewable, state what are the minimum GPA and course load requirements for each remaining year.

5. Scholarship Award Criteria

A. State Your Purpose:

e.g. To recognize individuals exhibiting leadership ability who have best demonstrated applying The 4-Way Test principles of truth, justice and a caring regard for one's neighbor in their relationships with members of the faculty, student body and within the larger community.

B. Eligibility - Who May Enter:

(1) High School, e.g.

a. Senior between 16 and 20 years of age by December of current school year.

b. Grade Point Average pf 2.7+

c. SAT/ACT top 1/3 nationally

d. Scholarship must be used to attend accredited college on full time basis (define in terms of course load carried for 2 semesters or 3 quarters) beginning next school year in the USA.

e. USA Citizenship (if applicable)

(2) College, e.g.

a. Sophomore between 18 and 22 year of age by December of current school year.

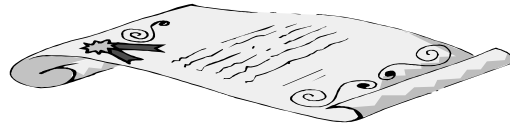
b. Grade Point Average of 2.7+

c. Class Standing top 1/3

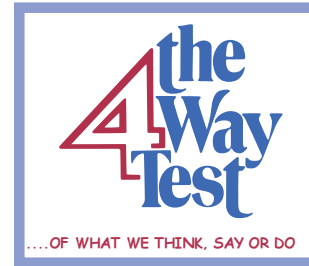
d. Scholarship must be used to attend current college on full time basis (define in terms of course load carried for 2 semesters or 3 quarters) beginning next school year.



- e. USA Citizenship (if applicable)
- C. **Suggested Entry Requirements**



- (1) High School
 - a. Scholastic transcript plus SAT/ACT scores.
 - b. Application Form filled out
 - c. Recommendations from **3 adults not related to applicant** who are familiar with 3 different areas of the student's activities (e.g. teacher, community leader, clergyperson) **and 1 student.**
 - d. Essay on Applying The 4-Way Test of 800-1000 words.
 - e. Proof of USA Citizenship (e.g. birth certificate or naturalization papers)
 - f. Agreement signed by applicant that if Scholarship Winner, he or she will share with your club/organization at some time after completing the year at school, their experiences, goals, and how they have used The 4-Way Test in their new relationships on and off campus.
- (2) College
 - a. Scholastic transcript
 - b. Application filled out
 - c. Recommendations from 3 adults not related to applicant who are familiar with 3 different areas of the student's activities (e.g. teacher, community leader, clergyperson) and 1 student.
 - d. Essay on Applying the 4-Way Test of 800-1000 words.
 - e. Proof of USA Citizenship (e.g. birth certificate or naturalization papers)
 - f. Signed agreement by applicant that if Scholarship Winner, he or she will share with your club/organization at some time after completing the year at school, their experiences, goals, and



how they have used The 4-Way Test in their relationships on and off campus.

D. **Make list of pre-selected high schools or colleges through which you will offer your scholarship.**

(1) Coordinate your giving through the Office of Financial Aid at the college level and with the Principal's Office/College Guidance Counselor at the high school level.



(2) *To avoid complications with certain parts of the tax code, many organizations*

have found it most efficient to award the money to a high school or college to administer and select the recipient based on the eligibility and entry requirements their organization has already chosen. Merit scholarships have come to be viewed by college administrators as a valuable recruitment tool.



F. **Your scholarship does not necessarily have to be given for a college education.** You can select a private elementary or secondary high school institution and give it to that institution. Your purpose could remain the same, but your requirements for eligibility and entry would need to be adapted. For instance, you might want to award the scholarship to a junior in a private high school to be used toward tuition requirements at the high school for their senior year.

6. **Appoint Selection Committee to:**

A. Answer questions and provide information about the scholarships available or any aspect of the application process to high schools or colleges involved.

B. Ensure that selected scholarship winners' applications are complete and accompanied by all required supporting documentation.

C. Ensure scholarship is used appropriately and that you have current home address and phone number for student as well as correct college information and transcript from college





of academic pursuits undertaken.

D. Make sure that scholars understand that the *money should be used for tuition, or maybe for books and fees.* (Scholarship funds used for travel, room and board, and miscellaneous expenses must be reported as taxable income on U.S. income tax returns.) Scholars are responsible for ascertaining their own tax liabilities. No part of the scholarship should be used to pay expenses of anyone other than the scholar. You can arrange for the money to go directly to the college of the student's choice if awarded to a high school senior.



E. Arrange details of award ceremony or some special acknowledgment of scholar.

F. Schedule (in-person if possible, if not written) report of year at college by scholarship student to your club/organization.

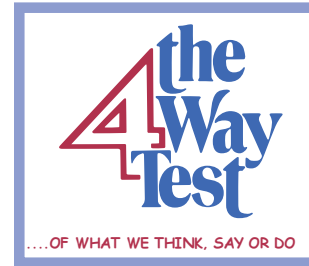
G. If scholarship is awarded through a college you have selected, you might want to arrange that all faculty and incoming freshmen receive a copy of The 4-Way Test to promote its awareness on campus. If the college is not too big, the first year you might want to arrange for the entire student body as well as the faculty to receive a copy of The 4-Way Test. In the years that follow, only the faculty, incoming freshmen and new students need receive it. You can arrange through the college for its distribution at the beginning or mid-point of each school year. This would also apply to a private high school where you are funding a scholarship for the school's senior year.



7. **Suggested Timetable:** Check with schools for their input, but the below is generally accepted.

A. In *August*, determine amount of money available to be distributed in scholarship form for upcoming school year and keep





money on tap in money market fund/escrow account for this purpose.

B. In *late August* or *early September* contact schools. Find out if they want to participate in your scholarship program for the current year. Explain program and how you would like to have it administered. (The first time do as much of this in person as possible.) Ask about the number of faculty, new students and incoming freshmen (or whole student body if first year for scholarship) so that you can arrange for them each to have a copy of The 4-Way Test. After determining the easiest way for the school to distribute this material to the designated people, ask them when they need copies of The 4-Way Test (a wallet card or bookmark works well) and make sure they have them on time. (This may be with 1st quarter grades or some schools may want to give it to students with 2nd quarter registration information. Distribution to faculty is easier.)

C. In *October* distribute application forms and letters of instruction on receiving a 4-Way Test merit scholarship to schools.

D. Deadline to receive applications and documentation from students should be *no later than the end of February*.

E. *Selection of scholarship winners should be made about April*. If a school is administering the scholarship, make sure you are notified by the school who is the scholarship winner and get their name, home address and home phone number. Ask that the student let you know by which school they have been accepted. that they plan to attend.

F. If a college is administering the scholarship to be used at their school by one of their students, they will probably *want to have the money in hand by a certain date* (sometimes not til August of the following year).. *Check with them!*

G. In *May, the scholarship should be formally awarded to take effect the next school year*. If awarded to a senior in high school, this will probably be done as part of the senior awards ceremony.

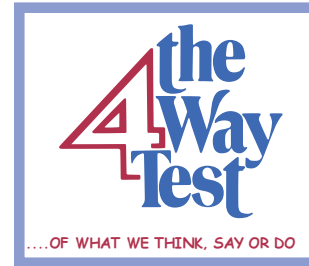
H. *If money is to go directly to a school designated by the scholarship student in the student's name, find out as early as possible from the student*





that college's guidelines for tuition payment and pay it to the school at that time.

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*Sample Application
on
Following Pages*

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4-WAY TEST MERIT SCHOLARSHIP APPLICATION

Statement of Scholarship Purpose

To recognize individuals with leadership potential who have demonstrated applying The 4-Way Test principles of truth, justice and a caring regard for one's neighbor in their relationships with members of the faculty, student body and within the larger community.

WHAT IS THE 4-WAY TEST?

The 4-Way Test consists of 4 short questions, 24 words, designed to make a difference in our lives. It reads:

- 1. Is it the TRUTH?**
- 2. Is it FAIR to All Concerned?**
- 3. Will it Build GOODWILL and Better Friendships?**
- 4. Will it Be BENEFICIAL to All Concerned?**

There is a great difference between winning success and being a success. The 4-Way Test helps us as we go about choosing and acquiring our desired prizes, to keep our inner eye open to what we are becoming, not just the prizes we strive to acquire.

The Test does not provide the answers, but encourages creative and effective solutions in problem solving situations. Its application is in the world of human relationships. Interestingly enough, no matter how technologically astute we become, nothing can really be accomplished in this world except through people -- ourselves and others, working, playing, communicating, trusting each other. Used, The 4-Way Test can create an attitude and atmosphere in which people can better relate, share and implement ideas.

The 4-Way Test is translated into the language of more than a hundred countries and sits on the desks of more than 1 million business and professional leaders around the world.

Brief History of The 4-Way Test and It's Use

The Test's international journey began in 1932. Herbert J. Taylor had just become president of Club Aluminum Products Company in Chicago, Illinois. The company employed 250 people, was bankrupt -- over \$400,000 in debt, in the midst of what is today known as The Great Depression.

Sample Application

Mr. Taylor was a Christian man who believed that in right there is might. He believed that ethical conduct played an important role in relationships. He felt that if the company's leadership and its employees were encouraged to think right, they would act right. What was needed was some sort of ethical yardstick which they could easily memorize and apply to what they thought, said or did in their relations with other people. This, he felt, would facilitate right action on the part of the company. In answer to prayer one evening came The 4-Way Test. He tried it out himself for 60 days, and found it very enlightening. Quite a few of the company's current business practices did not seem to stand up under its scrutiny. He was surprised.

After 60 days, Mr. Taylor, himself a Methodist, discussed it with four of his department heads, by faith, a Christian Scientist, a Roman Catholic, an Orthodox Jew and a Presbyterian. He asked, "Is this test contrary to anything in your faith?" The answer was NO and they agreed to memorize and use the test in their business decisions. Soon the company adopted it as its official policy of business conduct. He had the test copyrighted.

Five years later the company paid off the last of the \$400,000 debt with interest and distributed over a million dollars in dividends to stockholders, in spite of the continuing Great Depression.

The company gained much more from its use than the acquisition of a good financial statement. It helped them win friends, build goodwill and inspired confidence not only in their internal management/employee relationships, but also in the company's relationships with business associates, suppliers and customers. It helped each individual become a better person and better citizen.

In the late 1940's it was adopted by Rotary International and became a vital part of their Vocational Service Programs. In 1959 Mr. Taylor founded a non-profit organization The 4-Way Test Association, Inc. to promote and assist in its use within the larger business and political community. None of the Association materials carry any logo except that of The 4-Way Test. Over the years beginning in the 1950's there have been several city/community-wide 4-way Test campaigns with the active participation of many organizations within each city and/or metropolitan area. It has been introduced into schools, governments, businesses and homes as a stimulus for building better communications and stronger more effective relationships between people.

Mr. Taylor died in 1978, but his legacy of The 4-Way Test continues to grow.

For more information on The 4-Way Test please visit the internet website www.4waytest.org.

Sample Application

**REQUIREMENTS FOR SUBMITTING AN APPLICATION
for a
4-WAY TEST MERIT SCHOLARSHIP**

1. Complete the OFFICIAL APPLICATION FORM (print or type). DO NOT SEPARATE THE APPLICATION FORM. DO NOT STAPLE any supporting documents to the application form. Check every part of the application form to make sure it is complete before mailing. When your application is complete, make one (1) copy of ALL papers and include copies with original papers.
2. Send three (3) recent (not more than 6 months old) photos of yourself approximately the size of the outline (2" x 2") shown on the application form, one of which should be GLUED to the outline where called for.
3. **SUPPORTING DOCUMENTS REQUIRED WITH APPLICATION:**
 - (a) Your original high school transcript through 1st semester senior year (if currently a senior in high school) or final high school transcript if in college. Must include class standing.
 - (b) If presently in college, send original transcript of each semester attended including courses currently under study. Must include class standing.
 - (c) Transcript of SAT/ACT scores.
 - (d) Proof of USA citizenship.
4. Submit three (3) letters of recommendation from 3 adults not related to you who are familiar with 3 different areas of your activities (e.g. teacher, community leader, clergy person) and one (1) letter of recommendation from a student colleague. Letters should include information on your character, leadership ability, activities in and out of school, talents, academic and personal achievements, as well as your ability to get along with your teachers, students and co-workers with reference to applying The 4-Way Test, where applicable.
5. Include 800 - 1000 word essay on Applying The 4-Way Test.
6. Every applicant must sign the applicant's certification.

FULLY COMPLETED APPLICATIONS for the scholastic year beginning _____, 20__ and ending June 20__ **MUST** be received **NO LATER THAN** February 28, 20__ . Incomplete applications may deny consideration for a scholarship. Send application to the address below.



Sample Application

List Musical Instruments you play, include singing _____

List Societies and Student Organizations _____

SECTION 2 - EDUCATION/WORK/STUDY PLANS

List secondary (high school) and post-secondary (college) institutions in the order attended:

| Complete School Name | Location (City, State) | Attendance From To (Month/Year) | Graduation Date | Degree Earned |
|-------------------------|---------------------------|---------------------------------------|--------------------|------------------|
|-------------------------|---------------------------|---------------------------------------|--------------------|------------------|

ARE YOU CURRENTLY ENROLLED IN THE LAST INSTITUTION LISTED ABOVE? Yes No

Do you plan to graduate from your current institution? Yes No

What courses or field of study do you propose to pursue on your scholarship? _____

What, if any, has been your work experience?

| Employer | Type of Work | (Month & Year) | |
|----------|--------------|----------------|----|
| | | From | To |

Sample Application

SECTION 3 - APPLICANT'S CERTIFICATION

I hereby state that all the information given on this application is true to the best of my knowledge:

Print Name In Full

Signature

IF CHOSEN FOR THIS SCHOLARSHIP, I AGREE to give a short report to

Your Organizations's Name

_____ about my experience, goals and how I have used The 4-Way Test in my relationships on and off campus during my scholarship year.

I understand that my scholarship may be revoked for any of the following reasons: my inability to secure admission to college; low level of educational achievement; evidence of misconduct; withdrawal from institution prior to expiration of the term of the scholarship. I also understand that revocation of a scholarship shall cause not only payment to cease, but may make me liable for the return of payment previously provided.

Print Name In Full

Signature

Date

**ATTACH 800-1000 WORD ESSAY ON APPLYING THE 4-WAY TEST
OFFICIAL TRANSCRIPTS OF SCHOLASTIC RECORDS
SAT/ACT SCORE TRANSCRIPTS (High School)
TWO ADDITIONAL COLOR PHOTOGRAPHS
RECOMMENDATIONS (4)
PROOF OF USA CITIZENSHIP**

Sample Letter of Instruction to Administering College

August 15, 2006

**Dr. Thomas A. Hines
President
East West University
777 West Palm Avenue
Stanhope, North Dakota 21645**

Dear Dr. Hines:

Our organization is offering your school a 4-Way Test Merit Scholarship in the amount of \$2,500 for the upcoming school year.

This award provides that you will select a special Faculty Committee or use the present committee that awards scholarships, to select the undergraduate student (freshman through junior year) who during the past school year has best demonstrated applying The 4-Way Test principles of truth, justice and a caring regard for one's neighbor in his or her relationships with members of the faculty, student body and within the larger community. This selection should be based on the entry and eligibility criteria attached. A sample application form is enclosed.

In order to receive The 4-Way Test Merit Scholarship, will you please do two things: First, let me know if you would like to receive the scholarship this year. Second, let me know the number of persons on your faculty and the number of new students (freshman and transferees) you expect this school year. We will send a 4-Way Test bookmark (sample enclosed) for you to distribute to each faculty member and new student at your school.

We would appreciate your notifying us of your acceptance of this arrangement. We will send The 4-Way Test bookmarks by whatever date you need them for distribution purposes. We will send you application materials and forms in early October.

Please let me know by early May whom you have selected (their name, home and school addresses, and phone numbers) along with a copy of their application form, a picture and essay. We would like to send them congratulations and keep in touch.

If this meets with your approval, we will send you a check whenever you request, for \$2,500 in the winner's name for his or her tuition this next year at your at your school. If you have any questions or comments about this letter or any of the proposed arrangements, please call me.

Our organization thinks very highly of your school and its graduates. We are happy to be able to offer you this scholarship and hope that you will find it of assistance.

Sincerely,

**Joe Patterson
General Secretary**

Sample Letter of Instruction to Administering High School

August 15, 2006

**Dr. Simon Johnson
Principal
North South University
235 Louisiana Avenue
Logan, GA 32392**

Dear Dr. Johnson:

Our organization is offering your school a 4-Way Test Merit Scholarship in the amount of \$1,500 for the upcoming school year.

This award provides that you will select a special Faculty Committee or use the present committee that awards scholarships, to select the senior student who during the past school year has best demonstrated applying The 4-Way Test principles of truth, justice and a caring regard for one's neighbor in his or her relationships with members of the faculty, student body and within the larger community. This selection should be based on the entry and eligibility criteria attached. A sample application form is enclosed.

In order to receive The 4-Way Test Merit Scholarship, will you please do two things: First, let me know if you would like to receive the scholarship this year. Second, let me know the number of persons on your faculty and the number of new students (freshman and transferees) you expect this school year. We will send a 4-Way Test bookmark (sample enclosed) for you to distribute to each faculty member and new student at your school.

We would appreciate your notifying us of your acceptance of this arrangement. We will send The 4-Way Test bookmarks by whatever date you need them for distribution purposes. We will send you application materials and forms in early October.

Please let me know by early May whom you have selected (their name, home and school addresses, and phone numbers) along with a copy of their application form, a picture and essay. We would like to send them congratulations and keep in touch.

Please let me know by early May whom you have selected (their name, home and school addresses, and phone numbers) along with a copy of their application form, a picture and essay. We would like to send them congratulations and keep in touch.

Please have the scholarship money given directly to the college of the scholarship winner's choice in his or her name toward tuition costs. If this meets with your approval we will send you a check by whatever date you suggest for \$1,500. If you have any questions or comments about this letter or any of the proposed arrangements, please call me.

Our organization thinks very highly of your school and its graduates. We are happy to be able to offer you this scholarship and hope that you will find it of assistance.

Sincerely,

**Joe Patterson
General Secretary**