

## MEMO

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**From:** Cordell Tietz  
**Date:** April 17, 2020  
**Attention:** All Charter Employees  
**Subject:** Ed O'Kelly Scholarship Program for Children of Charter Mechanical Employees

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It is once again that time of year to announce that the application period for the **Ed O'Kelly Scholarship Program for Children of Charter Mechanical Employees** for 2020 is now open. Mr. O'Kelly, one of Charter's founders and its original President, has created this fund to assist with continuing education for selected and qualifying students. Enough cannot be said for his support of the hardworking men and women of our Charter family.

I want to thank Ed for his generosity in making this scholarship program available. Ed's leadership, planning and guidance were essential in starting Charter and creating the company that it is today, and he continues to give back to the company in many valuable ways.

Details for the scholarship and the eligibility requirements are included in the attached guidelines document. I encourage all eligible employees to review the guidelines as soon as possible. The deadline for this year's applications is **May 29<sup>th</sup>**. We want everyone who is interested to apply.

Selections of the scholarship recipients will be made by mid-August and will be available for the 2020 – 2021 academic year.

Please feel free to contact me if you have any questions. My contact information is included below.

Thank you,  
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# Ed O'Kelly Scholarship Program Guidelines

## Overview

Charter Mechanical's founding president, Ed O'Kelly, has established a scholarship program for the children of our full-time employees to encourage their pursuit of higher education and support their academic goals.

The Ed O'Kelly Scholarship Program for Children of Charter Mechanical Employees is a competitive program that provides scholarship to eligible children who are pursuing a post-secondary education. The program offers one-year scholarships at accredited institutions in the United States, including trade schools and four-year colleges or universities.

The program is administered by The Philanthropic Initiative, an operating unit of The Boston Foundation, in accordance with federal rules applicable to employer-related scholarship programs. In compliance with IRS regulations, the number of scholarships granted will be equal to or less than 25 percent of the eligible applications received each year. Scholarships will be granted without regard to race, color, ethnic origin, gender, sexual orientation, religion or disability.

## Scholarships

The scholarships will provide up to \$10,000 per academic year. Successful recipients may submit applications for up to 3 additional subsequent years, provided they have maintained a minimum grade point average of 3.0 out of 4.0 (or equivalent scale determined by the institution), and other eligibility criteria below. Scholarships can be used for tuition, academic fees and related educational expenses and will be paid directly to the university on behalf of the student. Payments outside of billed expenses will not be eligible for scholarship support.

## Eligibility

- Applicants must be children of full-time employees of Charter Mechanical as of the date of the scholarship award. The employee must have been employed full-time by the company for at least 24 consecutive months prior to the application deadline (*May 29, 2018*).
- Employees who retire in good standing shall be considered active employees for the purpose of granting scholarships to previous recipients who otherwise are able to re-apply.
- Recipients must be enrolled, or have accepted an offer for enrollment, full-time in a four-year college, university, or trade school for the upcoming academic year.
- Children of officers and directors of Charter Mechanical are not eligible for this scholarship program.

## Application

Interested students must complete all required information in the online application by **May 29, 2020**. All information submitted through the application process will be treated confidentially to the greatest extent possible while still allowing the review and processing of the application.

## Selection Process

The scholarship review committee will review all applications and render the scholarship selections. This committee will be comprised of professionals from The Philanthropic Initiative, a division of the Boston Foundation, and completely independent of Charter Mechanical.

The following criteria will be used to select recipients:

- Academic achievement
- Extracurricular activities, community involvement and demonstration of leadership
- Applicant's statement of goals and aspirations
- Applicant's financial need

## Application Process

Interested applicants will complete an online application. You can access the application here: <https://www.grantinterface.com/Home/Logon?urlkey=tpischolarship>

Once you create an account and log in, there should be an opportunity to enter an Access Code at the top of the page. Please enter: **Charter**

## Required Materials:

- Complete application submitted online
- Extracurricular information or resume
- High school transcript
- College transcripts for students who are already in college
- Letter of recommendation (from a guidance counselor, teacher, work supervisor, community leader, or any other non-family member who knows the applicant well)
- Essay
- Financial aid award letter
- FAFSA Student Aid Report (SAR)

## Scholarship Timeline

Application Due Date .....May 29, 2020  
Notification of Scholarship Decisions to Applicants .....Mid-August 2020  
Scholarship Payments Sent to Colleges .....Late August 2020

## Questions

If you have any questions about the Ed O'Kelly Scholarship Program, please email Elaines Pena at [epena@tpi.org](mailto:epena@tpi.org). Applicants may also call 617-338-5897.