

DAVID D. ALSTON SCHOLARSHIP FUND

71 SUMMARY OF THE DAVID D. ALSTON SCHOLARSHIP FUND

71 Introduction and Background

71 Funding of Benefits

71 BENEFITS

71 Eligibility for Benefits

72 Applying for Benefits

72 Selection Process

72 Computation of Benefits

74 Appeal of a Denied Claim

74 QUESTIONS OFTEN ASKED ABOUT THE DAVID D. ALSTON SCHOLARSHIP FUND

76 IMPORTANT NAMES AND ADDRESSES

DAVID D. ALSTON SCHOLARSHIP FUND **SUMMARY PLAN DESCRIPTION**

Introduction and Background

The David D. Alston Scholarship Fund (the “Fund”) is sponsored by the Employer Members of the Hampton Roads Shipping Association (the “HRSA”) and the Affiliated Locals of the International Longshoremen’s Association, AFL-CIO (the “ILA”) in the Port of Virginia, pursuant to several Collective Bargaining Agreements between the HRSA and the ILA.

This Summary Plan Description will describe the general provisions of the Fund. The Fund was established for the benefit of the dependents of employees working within the jurisdiction of the International Longshoremen’s Association in the Port of Virginia. It is a welfare plan that provides financial assistance through scholarships to dependents of certain participants of the HRSA-ILA Pension Plan.

Funding of Benefits

Previous contributions to the Fund by the HRSA-ILA Fringe Benefit Escrow Fund have enabled us to endow the Fund. An Endowed Fund is a separate trust fund, which is used to provide benefits under the Fund. The Fund may also receive contributions from the Hampton Roads District Council ILA and the Hampton Roads Shipping Association.

BENEFITS

Eligibility for Benefits

The scholarship program is open to unmarried children of any active or retired employee who has at least 10 years of vesting service in the HRSA-ILA Pension Plan. The Plan will recognize as a child eligible for scholarship consideration any:

- single person,
- whose relationship with an employee with 10 years of vesting service in the HRSA-ILA Pension Plan is:
 - 1) a natural child of the employee,
 - 2) a step child in the current marriage of the employee,
 - 3) an adopted child of the employee, or
 - 4) a child for whom legal guardianship has been awarded to the employee; and
- whose age at the time of the scholarship application does not exceed 24.

Effective January 1, 2018, to be considered for a scholarship, your child must be enrolled, or accepted for enrollment, in an accredited educational institution on a full-time academic basis. However, if your child must enroll on a part-time basis (less than 12 credit hours) due to a medical reason, the Trustees may (in their sole discretion) consider your child eligible for a scholarship.

If a recipient of a scholarship has to reduce his/her status to part-time (less than 12 credit hours) due to a medical reason, the Trustees may (in their sole discretion) elect to continue his/her scholarship award and not require the repayment of scholarship funds received for that semester. It is the responsibility of the scholarship recipient to notify the Trustees of the medical reason requiring a change to part-time status and provide medical documentation as requested by the Trustees.

The Fund provides financial assistance through scholarships to dependents in obtaining a college level education. An independent panel of educators meets annually to review and recommend to the HRSA-ILA Board of Trustees the students to receive scholarships, the maximum amount of each scholarship, and the terms of payment. Scholarships are available for Associate and Bachelor degrees or graduate level degrees at accredited colleges, universities, business or trade schools. The amount the scholarship provides will vary depending upon the school selected by a

recipient and the source and amount of other financial aid. A total of eight (8) scholarships are funded each year.

Applying for Benefits

If scholarships are available, the Fund sends a notice in February to employees who have children that are eligible to apply. The notice will explain how to obtain an application and the deadline for applications.

To apply for the scholarship your child must submit a typewritten application and a certified copy of school transcripts. The deadline for submitting applications will be posted on the application notice and on the application. **Applications that are received after the deadline will not be considered.** To obtain an application form, contact the David D. Alston Scholarship Fund. The office is located at 1355 International Terminal Boulevard, Norfolk, VA 23505-1458, telephone (757) 457-7090 or Toll Free 1 (800) 899-3090 if out of the local calling area. Applications are available during the application period on the HRSA-ILA website, <https://www.hrsa-ila.com>.

Selection Process

An independent panel of educators selects the scholarship recipients. The panel reserves the right not to award all available scholarships if there are not suitable applicants.

The following guidelines are used by the Panel in the selection process:

- Applicants must complete and submit a typewritten application not later than the posted deadline.
- Applicants must have a 3.0 cumulative Grade Point Average or higher to be considered.
- Applications must include school transcripts and test scores.
- Scholarship applicants may be interviewed by the Committee.
- The Committee takes the following into consideration in selecting scholarship recipients:
 - 1) community, school, and extracurricular activities;
 - 2) recommendation letters;
 - 3) essay;
 - 4) school grades, test scores, and Grade Point Average;
 - 5) rigor of high school courses taken;
 - 6) potential of success in college;
 - 7) class rank;
 - 8) other sources of financial assistance available to the applicant;
 - 9) applicant interview, if requested by the committee.

NOTE: An applicant in the freshman year of college must include high school transcripts with the application.

Computation of Benefits

Documentation Required: Recipients of a scholarship are required to provide the following documents to enable the Fund to calculate the scholarship amount:

- A breakdown of the costs of attending the school of choice must be provided in an official form by the school
- A statement from the school of choice of any financial aid for the school year
- An Alston Scholarship Financial Aid Form. All sources of educational funding to be received by the student, such as loans, grants and other scholarships, must be disclosed. Educational funding that does not have to be repaid is deducted from the Alston Scholarship. Funding such as a loan that must be repaid will not be deducted from the Alston Scholarship.

NOTE: No scholarship funds will be released until all documentation is received.

What is Covered: In general, the scholarship covers the following school-related costs:

- Tuition
- Textbooks
- Required fees

Tuition will be paid directly to the university by the Scholarship Fund.

Sometimes, the book allowance provided is not adequate for certain curricula or class loads. The student may apply for additional funding if the student can prove by receipts, instructor letters, etc., that additional books costing more than the allowance are required, up to the maximum amount of the scholarship.

Amount of the Benefit

The amount of the scholarship is set each year based in part on Virginia college costs supplied by the Virginia Council on Higher Education. Generally, the annual scholarship amount is designed to cover the tuition, fees, and books for attending a public supported Virginia college or university for a year. Upon receiving the required documentation, the Fund determines the cost of the school the recipient has chosen and then subtracts the amount of financial aid the student is receiving from other sources which does not have to be repaid. The remainder is the amount of the scholarship, subject to the maximum scholarship amount adopted by the Board of Trustees.

Example: 2022-2023 Annual Maximum Award equals \$9,800.

Expenses (1st semester)

Tuition	\$6,000
Textbooks	500

Total Expenses	<u>6,500</u>
Grant	- 500

Scholarship Payment for 1st Semester \$6,000

\$6,000 is deducted from the maximum annual award of \$9,800 leaving \$3,800 available to be applied to 2nd semester.

The maximum annual award may change from year to year based upon the decision of the Board of Trustees and the guidance of the State Department of Higher Education.

Loss of Benefits

A recipient of a scholarship will lose his/her eligibility for scholarship when:

- the cumulative grade point average falls below 3.0 for undergraduate or “Good Academic Standing” for graduate study for any semester; or
- the recipient falls below 12 credited hours at any time during the semester; or
- the recipient may no longer be classified as a dependent of the HRSA-ILA member; or
- the employee parent becomes classified as a Vested Terminated Participant under the HRSA-ILA Pension Plan or whose employment in the industry is terminated.
- If the withdrawal, audit or non-completion of the course reduces the number of credited hours taken below 12, the scholarship will be terminated and scholarship funds advanced for the semester must be repaid to the Fund.

NOTE: It is the responsibility of the student to notify the Scholarship Fund upon withdrawing, auditing or non-completion of any course.

Duration of Benefits

- 4 years for undergraduate unless recipient is in a curriculum that requires five years of study. Documentation from the university must substantiate the five year curriculum.
- 3 years for graduate study unless the graduate degree requirements are completed sooner.

Appeal of a Denied Claim

See Administration Section (Page 6) for the procedures to appeal a denied claim.

QUESTIONS OFTEN ASKED ABOUT THE DAVID D. ALSTON SCHOLARSHIP FUND

Will I be notified when my son or daughter becomes eligible to apply?

If David D. Alston scholarships are available, a notice is mailed in February to all participants with eligible dependents. This notice gives instructions on how to obtain an application and the deadline for submission. You can also look for Scholarship announcements on the HRSA-ILA website, <https://www.hrsa-ila.com>.

How does my child apply for the scholarship?

If your child meets the eligibility requirements, you or your child may obtain an application by calling the Participant Services Department of the HRSA-ILA Funds, (757) 457-7090 or Toll Free 1 (800) 899-3090. Applications will also be available through the HRSA-ILA website, <https://www.hrsa-ila.com>.

What is the deadline for submitting an application?

The deadline for submission is posted on the eligibility notification as well as on the application. The HRSA-ILA website, <https://www.hrsa-ila.com>, also publishes notification of scholarship availability.

What if I miss the deadline?

No late or incomplete applications will be forwarded to the panel for consideration. A “complete” application consists of a signed, typewritten application, current school transcript, 3 letters of reference, and a 300-word essay for undergraduate and a 500 to 700-word essay for graduate level scholarships.

How is the selection made for the scholarship awards?

A panel of educators reviews the applications taking into consideration Grade Point Average, rigor of courses taken, class rank, recommendation letters, extracurricular activities, sources of financial assistance available to the applicant, potential for success in college, and applicant interview, if requested by the panel.

Can my child receive the Scholarship for summer school?

If your child has money remaining from the fall and spring semesters it may be applied to summer school classes. The student must supply proof of enrollment and a statement of account or invoice from the school.

How is the amount of the Scholarship determined?

The HRSA-ILA Board of Trustees calculates the average tuition and required fees from information provided by the State Department of Higher Education. Only residential state supported schools are included in averaging. The cost of textbooks is issued by the Tidewater Scholarship Foundation. These amounts, as well as the available funding, are considered to determine the maximum annual scholarship.

My child received the David D. Alston Scholarship. Must a current recipient of the scholarship reapply?

Your child does not need to reapply provided he or she has met the requirements for maintaining the scholarship and continues to be an eligible dependent. If your child plans to attend graduate school, an application for a graduate level scholarship must be submitted by the required deadline. Required documentation to initiate the payment process must be submitted each semester.

Is Financial Aid deducted from the amount of the Scholarship?

If your child receives a grant or another scholarship that does not require repayment, that amount is deducted from the school's educational costs. Educational loans or other funding that must be repaid are not deducted from the scholarship amount.

What happens if textbooks cost more than what was allocated?

Receipts for required textbooks and educational expenses may be submitted for additional reimbursement up to the maximum amount of the scholarship.

Is the cost of a computer covered by the scholarship? No.

What if my child withdraws from a class?

If the withdrawal results in your child falling below the 12 credited hours required for full time status, he/she will be terminated as a scholarship recipient and educational expenses advanced for the semester must be repaid to the scholarship fund. Tuition paid by the Fund for a class that is withdrawn from must be returned to the Scholarship Fund. It is the student's responsibility to notify the Scholarship Fund of a change in school or dependency status. If the withdrawal was due to medical reasons, your child may submit a written request to the Trustees asking to continue the scholarship. The Trustees may require medical documentation to consider the request.

What happens if I prepay my child's tuition?

The David D. Alston Scholarship Fund pays directly to the college or university. Prepayment is not necessary and will not be reimbursed to you.

IMPORTANT NAMES AND ADDRESSES

ADMINISTRATIVE OFFICE OF THE PLAN

David D. Alston Scholarship Fund
1355 International Terminal Boulevard
Norfolk, VA 23505-1458
Phone Number: (757) 457-7090
Toll Free: 1 (800) 899-3090
<https://www.hrsa-ila.com>

FUND SPONSORS

Hampton Roads Shipping Association
236 E Plume Street
Norfolk, VA 23510
Phone Number: (757) 622-2639

Hampton Roads District Council
International Longshoremen's Association
1355 International Terminal Boulevard, Suite 201
Norfolk, VA 23505-1458
Phone Number: (757) 440-9420

A complete list of the employers and employee organizations sponsoring the Fund may be obtained by the participants and beneficiaries upon written request to the Fund Administrator and is available for examination during business hours (8:30 a.m. to 5:00 p.m.) at the Fund's Administrative Office.

Agent for Service of Legal Process
HRSA-ILA Board of Trustees
David D. Alston Scholarship Fund
1355 International Terminal Boulevard
Norfolk, VA 23505-1458

Service of legal process may also be made on any member of The Board of Trustees.

The HRSA-ILA Board of Trustees may terminate, suspend, withdraw, amend or modify the David D. Alston Scholarship Fund in whole or in part at any time.