Pre-Application Checklist

Applicants are considered for admission on a first come, first serve basis after turning in a complete application packet. As we have limited space in our program, some eligible students may be placed on a waiting list. Making sure all required materials are submitted initially will help secure your application’s place in the screening line and will lower your chances of being wait-listed.

To ensure an efficient application process, please have the following information/documents ready to complete your application packet:

- Your Social Security Number (and your parents'/guardians’ SSN, if they do not file taxes)

- Transcripts from your current school (including your Student ID #, cumulative GPA, rank in class, and list of courses taken with assigned grades)

- Parent/guardian employment and financial information, including a signed copy of pages 1 & 2 of the most recent tax return filed (unless certifying non-filing status)
Dear Parent or Guardian,

Your child has shown interest in TRIO-Upward Bound. This application has been given to him/her to determine eligibility for our program services. So that you understand Upward Bound and the partnership between the student, parent, school, University of Montana, and Upward Bound, this letter is designed to answer common questions about our pre-college program.

**What is Upward Bound?** Upward Bound is a FREE college prep program funded by the U.S. Department of Education and designed to prepare qualifying students for college success.

**How does a student qualify?** Federal regulations require we serve students who…

1. meet federal low income guidelines,  
2. are from families where neither parent or legal guardian earned a bachelor’s degree in college.

Additionally, the University of Montana Upward Bound program selects students who…

- earn above average grades,  
- are sincerely interested in going to college,  
- have good school behavior and attendance records,  
- and have an academic need for Upward Bound services.

We accept applications from eighth graders in their last semester of middle school and from ninth and tenth grade students. Once selected as an Upward Bound participant, the student will be served through high school graduation with an opportunity to earn college credit the following summer, at the expense of Upward Bound.

**What services does Upward Bound offer?** There are two complementary parts to the program—a summer residential component and an academic year component.

**Summer Program Component.** For six weeks (mid-June to the end of July), fifty-five Upward Bound students from Missoula and Browning high schools live at the University of Montana and engage in academic learning and social growth. They attend daily classes in math, English, science, and a seminar aimed towards developing leadership and college preparation skills—courses that are (in part) required for admission into the Montana colleges and universities. In most cases, students earn high school elective credit for the Upward Bound courses they successfully complete.

While living on campus in the Upward Bound residence hall, students are supervised by a team of 8 resident advisors. Boys and girls are housed on separate floors, and strict rules are enforced to protect the privacy and safety of each student.

In addition to the instruction and community living, weekends are reserved for outdoor recreation activities and travel. All of the activities are well-supervised and designed to expose participants to new and exciting experiences.

**Academic Year Component.** Students meet at least one hour each week with a local Upward Bound Academic Coordinator. Pre-college activities, academic advising, career counseling, ACT/SAT test preparation, and tutoring are a few of the services the staff provides each student during the academic year. In addition to this mentoring, the program director
meets two or three times a year with each student to monitor academic progress. Seniors are given even more help finding sources of college funding and completing applications for financial aid, scholarships, and college admission.

**How much does it cost to participate?** There is no cost to participants. All costs associated with participating in the summer and academic year components are paid by Upward Bound (transportation, food, housing, recreation, supplies, summer tuition, registration fees, etc).

**What do I need to do?** Help your child complete this application. If he or she is accepted into our program, you can encourage attendance at the summer and academic year programs. Also, express interest in your child’s decision to improve his/her academic skills and to go to college after high school. **Research shows that parental interest in a child’s education is the single most important factor in their child’s academic success.** Sometimes parents/guardians are invited to participate in informational sessions. Parents/guardians are expected to attend these infrequent meetings.

**What can you expect from Upward Bound?**

**Experience**—the University of Montana Upward Bound program has served students since 1966. During that time, a team of staff has emerged that is competent, experienced, sensitive, and committed to students. Often our staff is from the same cultural and family backgrounds as the students, and each understands the process of becoming a successful college student.

**Commitment**—the UM Upward Bound program is well funded. Over $4500 will be spent each year on student participants. We provide intensive services that enhance skills and motivation. This level of investment in education is beyond what many parents could afford to provide.

**Success**—the best indicator of how effectively Upward Bound prepares students for college success is described in a recent national study. According to the Council for Opportunity in Education, “students who participate in Upward Bound are **four times more likely to complete a college degree** than students who do not participate in the program.” Our program is highly regarded by Montana colleges and universities for its success in preparing students for college.

**What if I have more questions?** Because this letter is short and you might have more questions about the program, you are encouraged to call 243-2219 during business hours. I am happy to answer your questions. Thank you.

Sincerely,

Twila Old Coyote, TRIO- Upward Bound Director
twila.oldcoyote@umontana.edu  (406) 243-2219

The UM TRIO – Upward Bound program is funded each year at $356,313; 100% of which are federal funds.
Student Application

Instructions: This application requires responses from the student, the student’s parent/legal guardian, the student’s English teacher, and the student’s school counselor. All information is kept confidential and only seen by program staff to determine whether the student is eligible for services.

PART A: General Information about You, the Student (completed by the student)

Name (Last, First, Middle Initial) __________________________________________________________________________________________ __________________________________________________________________________________________

__________________________________________________________________________

Social Security Number ___________________________________________________________________________ Today’s date

__________________________________________________________________________ Student phone number

__________________________________________________________________________

Your current street address or P.O. Box number __________________________________________________________

City/town __________ Zip Code __________

Date of birth (month/day/year) __________ Age ____________

Your sex: □ Male  □ Female

Are you a U.S. citizen? □ Yes   □ No __________________________

What is your ethnic heritage? __________________________

If you are American Indian, what tribes are you affiliated with? __________________________

If you are a permanent resident alien, what is your A number? □ Yes □ No A __________

What language do you speak primarily? __________________________

□ English  □ Other (what)  □ English & Other (what)

Do any of the following circumstances apply to your current situation? Check all that apply.

□ Homeless  □ In foster care  □ In the Juvenile Justice system

Do you have a disability (physical or learning)? Circle One. □ Yes □ No

If yes, what is your diagnosis? Please describe any special assistance you need.

Have you participated in TRIO-Upward Bound before? □ Yes   □ No Where?________________________

3
Have you participated in any of the following programs? Check all that apply.

- [ ] Upward Bound – Math and Science
- [ ] Talent Search
- [ ] GEAR Up
- [ ] Another federally funded college access program. Please specify: ________________________________

PART B: Information about Your Academic and Extra-Curricular Background (completed by the student)

I am in ______ grade at ____________________ School.

If in 8th grade, I will attend ____________________ High School in the fall.

I will graduate from high school in the year 20____.

How easy or hard do you find each of the following activities?

<table>
<thead>
<tr>
<th>Skill area</th>
<th>Usually easy</th>
<th>Sometimes easy, sometimes hard</th>
<th>Usually hard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing math problems</td>
<td>____________</td>
<td>____________</td>
<td>____________</td>
</tr>
<tr>
<td>Writing papers</td>
<td>____________</td>
<td>____________</td>
<td>____________</td>
</tr>
<tr>
<td>Understanding what I read</td>
<td>____________</td>
<td>____________</td>
<td>____________</td>
</tr>
<tr>
<td>Understanding science</td>
<td>____________</td>
<td>____________</td>
<td>____________</td>
</tr>
</tbody>
</table>

Class Schedule: What classes are you taking right now?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Please list any sports, school clubs, and/or community activities you have done this year.
PART C: Written Statement  (required, to be completed by the student)

Instructions: In a one page response, please tell us why you are interested in joining Upward Bound. Your response should outline your educational and career goals. For example, where do you see yourself working in 10 years? What will you study in college to get there? How will being in Upward Bound help you get to college? If you need more space, attach a separate sheet of paper. DO NOT SPEED THROUGH THIS! Think about your responses and write them in your own handwriting, carefully and clearly. Incomplete responses will not be accepted.

______________________________________________________________________________

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PART D: **Family Information** *(completed by parents/guardians)*

Who is the student’s **male** legal guardian? *(Write “none” if the situation applies).*  
Name: ____________________  
Relationship to student: ____________________  
Address: ____________________  
Phone No.: ____________________  
Occupation: ____________________  
Employer: ____________________

Who is the student’s **female** legal guardian? *(Write “none” if the situation applies).*  
Name: ____________________  
Relationship to student: ____________________  
Address: ____________________  
Phone No.: ____________________  
Occupation: ____________________  
Employer: ____________________

*The following question asks if the parent or legal guardian went to college and finished a **bachelor’s degree**. Bachelor's degrees are often associated with 4 years of study.*

Has the **male** legal guardian completed a college bachelor’s degree?  
Has the **female** legal guardian completed a college bachelor’s degree?  

List each person that lives with the student (and their relationship to the student).  

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Self</td>
<td></td>
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</tbody>
</table>

In case of an emergency, list a close relative who **does not live with you**:

Name and Relationship: ____________________

Phone number: ____________________
PART E:  Family Income Information  (completed by legal guardians)

The University of Montana receives funding from the U.S. Department of Education (ED). Federal laws require that Upward Bound keep family income information on file to prove that our students meet the income guidelines set by the Department of ED—a process called “income verification.” We collect this information with the application because no student can be admitted into Upward Bound without appropriate income verification documentation described below. Adhering to federal privacy laws, all financial information is kept confidential and secured in a locking file cabinet. It is not used for any purpose other than to prove student eligibility.

The LEGAL GUARDIAN(S) of the applicant must complete one of the following income verification requirements.

1. **IF THE LEGAL GUARDIAN(S) WAS/WERE EMPLOYED, ATTACH A SIGNED COPY OF THE 1040 OR 1040A FEDERAL TAX RETURNS (PAGES 1&2 ONLY) FILES FOR THE MOST RECENT TAX YEAR.** If the guardians filed separately, send copies of both returns. Simply attach the copies of the returns to this application and go to Part F.

 OR

2. **If the guardian(s) were not employed or did not make enough money to file taxes, please provide complete information below and sign the following:**

   **“Certification of Income Tax Non-Filing Status.”**

   I did not and will not file a federal tax return for the past tax year because my gross income was insufficient to require filing.

   **ONLY FILL OUT THIS STATEMENT IF YOU DID NOT OR WILL NOT FILE TAXES**

<table>
<thead>
<tr>
<th>Male parent or male legal guardian signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Income</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>Female parent or female legal guardian signature</td>
<td>Date</td>
</tr>
<tr>
<td>Annual Income</td>
<td>Social Security Number</td>
</tr>
</tbody>
</table>

Again, please understand that income verification is a one-time process to see if your student is eligible for our services. **We will not need updated income information in future years.**
PART F: Parental Permission and Certification (completed by parents/guardians)

Our success hinges on the commitment each student and his/her parents dedicate to education. Upward Bound students need to see the importance of education and take advantage of every opportunity that Upward Bound has designed to ensure their academic success. The student’s parents must also value education and must make sure their student is available for our services.

With the support of the students, the parents, the schools, and the Upward Bound staff, we will collectively build the skills and motivation that the students will need to succeed in college.

Accordingly, do you (the parent/legal guardian)

- give permission for your son or daughter to participate in the academic, social, travel, community service, and recreational activities held during Upward Bound’s academic year and residential six-week summer components?
  - yes
  - no

- authorize Upward Bound to set generally acceptable behavior rules, expectations, and policies; hold your student accountable to the rules, expectations, and policies; and potentially revoke your student’s participation from the program if the student cannot comply with the rules, expectations, or policies?
  - yes
  - no

- give Upward Bound staff permission to access your son or daughter’s academic records (i.e.: grade reports, class schedules, school records that pertain to UB participation) and income information to confirm eligibility for free and reduced hot lunch?
  - yes
  - no

- certify that the information provided in this application is true and accurate?
  - yes
  - no

Parent or Legal Guardian’s Signature  __________________________  Date  ________________

In the space below, or on a separate sheet of paper, please provide a brief written statement of your commitment to your child’s education.
TRIO-Upward Bound utilizes a variety of personal information to document and maintain student eligibility for program services, to report program performance to federal granting authorities, and to adequately meet the goals and objectives of the grant:

- the program requires secondary school academic information for application assessment and advisement purposes
- the program tracks student progress towards completion of a postsecondary degree and requests enrollment information annually about postsecondary attendance and completion
- the U.S. Department of Education requires Upward Bound’s access to students’ academic records
- verification of the student’s eligibility for free and reduced lunch enables Upward Bound to participate in a United States Department of Agriculture food program that offsets the cost of meals during the Summer Program Component.

Academic information requested by Upward Bound staff will include copies of high school transcripts, standardized assessments, attendance and behavioral records, IEP/IDP’s, and electronic or web-based records such as Zangle, Q, PowerSchool, Infinite Campus, or another student database program. Postsecondary enrollment information and academic performance reports will be obtained directly from colleges, universities, and other information sources such as National Student Clearinghouse. Information about eligibility for free and reduced hot lunch will be obtained from the school district most recently attended by the student and includes ONLY the information that the student is eligible or ineligible; no income figures will be requested by Upward Bound.

Upward Bound will request information only for the purposes mentioned above, and will observe confidentiality through proper maintenance of academic reports in secure files accessed only by UB administrative staff.

I, ___________________________, hereby authorize the University of Montana (print student’s name)
TRIO-Upward Bound staff to (please check the appropriate boxes):

☐ access academic information from school districts, colleges, and universities I have attended and obtain academic records identified above

☐ obtain information about my eligibility for free and reduced hot lunch

______________________________  ___________________________  ____________
Student PRINTED Name            Student Signature        Date

______________________________
Student Social Security Number

______________________________  ___________________________  ____________
Parent’s PRINTED Name           Parent Signature           Date
PART G: Application Completion and Mailing Instructions

Application completion process: Now that the application is filled out by both the student and parents/legal guardians, a few more important tasks must be completed.

- The student and parent/guardian need to sign the “Information Release Form” on page 10.
- The parent/guardian needs to sign the permission line on the English Instructor Reference Form. The student will deliver the form to his/her English teacher and ask the teacher to fill out the form. The teacher will send the form directly to Upward Bound when completed.
- The parent/guardian needs to sign the permission line on the School Counselor Reference Form. The student will deliver the form to his/her school counselor and ask the counselor to fill out the form. The counselor will send the form directly to Upward Bound when completed.
- Request a copy of your transcripts from your current school and include them with your application.
- The student needs to send the student and legal guardian parts of the application (pages 3-10), their guardians’ taxes, and their transcripts to:

  Mailing address: TRIO-Upward Bound
  001 Brantly Hall
  University of Montana
  Missoula, MT 59812

  Fax: 406.243.5296

If you are unsure about any part of the application process, feel free to ask questions. Please call Director Twila Old Coyote at 243-2219 during business hours or email twila.oldcoyote@mso.umt.edu for help.

We will write you a letter within a few weeks letting you know whether you are accepted!

Check List:

Have you...

- Completed the application -- did you and your parents/guardians answer EVERY question?
- Enclosed a copy of pages 1 & 2 of your guardians’ most recent signed federal income tax return (if they filed taxes)?
- Enclosed a copy of your school transcripts?
- Given the reference forms to your English teacher and school counselor (after your parent/guardian signed them)?
- Signed the information release form?

Missing one of these steps will significantly delay your application. THANK YOU.
** Applicant’s name: ________________________________

** English instructor’s name: ________________________________

I, the parent/guardian of the listed student, give permission for the teacher to provide this information to Upward Bound:

** Parent/Guardian Signature: ________________________________

** English Instructor Reference Form

You have been asked to serve as a reference for the above-named TRIO-Upward Bound applicant. By applying to Upward Bound, the student has expressed an interest and commitment to enhance their academic skills in preparation for college enrollment after high school.

Identifying and selecting UB students is a comprehensive process that seeks information from a variety of sources. The goal is to select students who have at least average academic ability, yet demonstrate need for program assistance—a U.S. Department of Education mandate. To help us determine the applicant’s academic ability and need for services, please answer sections I and II based on your observations of the student to date.

**IMPORTANT**

1. Please DO NOT complete this form until it has been signed by a parent or guardian!

2. Your responses to these questions will be kept confidential and will not be shared with the student or the student’s family.

3. Once complete, please fax to 406.243.5296, deliver in a sealed envelope to your high school’s UB Academic Coordinator, or mail to TRIO-Upward Bound, 001 Brantly Hall, Missoula, MT 59812. **PLEASE DO NOT GIVE THE COMPLETED FORM BACK TO THE APPLICANT!**

**SECTION I** – The applicant exhibits the following indicators of academic need:

[Check all that apply]
- Lack of opportunity, support, and/or guidance to take challenging college preparation courses
- Lack of career goals and/or need for accurate information on careers
- Limited English proficiency
- Lack of confidence, self-esteem, and/or social skills
- Living in a predominantly low income community
- Living in rural isolation
- Interest in careers in math and science
- Low scores on standardized tests
- Low educational aspirations
### SECTION II – Proficiency in Montana Content Standards for Writing

<table>
<thead>
<tr>
<th>Please circle ‘Proficient’ or ‘Not Proficient’ for each standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Student writes clearly and effectively.</td>
</tr>
<tr>
<td>2. Student applies a range of skills and strategies in the writing process.</td>
</tr>
<tr>
<td>3. Student evaluates and reflects on their growth as a writer.</td>
</tr>
<tr>
<td>4. Student writes for a variety of purposes and audiences.</td>
</tr>
<tr>
<td>5. Student recognizes the structures of various forms and applies these characteristics to their own writing.</td>
</tr>
<tr>
<td>6. Student uses the inquiry process, problem-solving strategy, and resources to synthesize and communicate information.</td>
</tr>
</tbody>
</table>

**Additional Comments:**

I have provided true and accurate information based on my observations of the applicant to date.

_____________________________  __________________________
English Instructor Signature     Date

Thank you for your candor and assistance.

*If you have questions about this form, please see your local high school’s Upward Bound Academic Coordinator or call our main office at 406-243-2219.*
Applicant’s name: ________________________

Counselor’s name: ________________________

I, the parent/guardian of the listed student, give permission for the counselor to provide this information to Upward Bound:

Parent/Guardian Signature: ________________________

School Counselor Reference Form

You have been asked to serve as a reference for the above named TRIO-Upward Bound applicant. By applying to Upward Bound, the student has expressed an interest and commitment to enhance their academic skills in preparation for college enrollment after high school.

Identifying and selecting UB students is a comprehensive process that seeks information from a variety of sources. The goal is to select students who have at least average academic ability, yet demonstrate need for program assistance—a U.S. Dept. of Education mandate. To help us determine the applicant’s academic ability and need for services, please answer sections I, II, and III based on your observations of the student to date.

**IMPORTANT**

4. Please DO NOT complete this form until it has been signed by a parent or guardian!

5. Your responses to these questions will be kept confidential and will not be shared with the student or the student’s family.

6. Once complete, please fax to 406.243.5296, deliver in a sealed envelope to your high school’s UB Academic Coordinator, or mail to TRIO-Upward Bound, 001 Brantly Hall, Missoula, MT 59812. PLEASE DO NOT GIVE THE COMPLETED FORM BACK TO THE APPLICANT!

SECTION I – The applicant exhibits the following indicators of academic need:

[Check all that apply]

☐ Lack of opportunity, support, and/or guidance to take challenging college preparation courses
☐ Lack of career goals and/or need for accurate information on careers
☐ Limited English proficiency
☐ Lack of confidence, self-esteem, and/or social skills
☐ Living in a predominantly low income community
☐ Living in rural isolation
☐ Interest in careers in math and science
☐ Low scores on standardized tests
☐ Low educational aspirations
SECTION II – Standardized Test Scores.

We understand that not all schools utilize the same testing tools in the same grades. Please use this section to report the applicant's most recent ELA and math scores from whichever tool your district uses.

Reporting from assessment at the applicant’s ______ grade level (enter grade level in blank)

**English/Language Arts**

- Advanced
- Proficient
- Nearing
- Not Proficient
- N/A

**Mathematics**

- Advanced
- Proficient
- Nearing
- Not Proficient
- N/A

SECTION III – Skills and Traits

Please circle most appropriate response. Include comments to help the selection committee understand the skills of the student.

**Level of self-esteem**

High   Satisfactory   Low

Comment:

**Interpersonal/social skills**

Well developed   Satisfactory   Needs improvement

Comment:

**Academic aptitude**

Above Average   Average   Below Average

Comment:

**Attendance**

Good   Average   Poor

Comment:

**Behavior**

Good   Sometimes good   Poor

Comment:
Additional Comments:

I have provided true and accurate information based on my observations of the applicant to date.

____________________________________
Counselor Signature

____________________________________
Date

Thank you for your candor and assistance.

If you have questions about this form, please see your local high school’s Upward Bound Academic Coordinator or call our main office at 406-243-2219.