



This form is for all applicants and must be completed in full.

## K-12 SCHOLARSHIP APPLICATION 2014/2015 SCHOOL YEAR

**A. Parent/Guardian Information** *(only those residing in the student's household in 2013)*

1. 1st Parent/Guardian's Name: \_\_\_\_\_  
First Name Middle Initial Last Name
2. 2nd Parent/Guardian's Name: *(if applicable)* \_\_\_\_\_  
First Name Middle Initial Last Name
3. Address: \_\_\_\_\_ City: \_\_\_\_\_, PA ZIP: \_\_\_\_\_
4. County: \_\_\_\_\_
5. Primary Phone: ( ) \_\_\_\_\_ Alternate Phone: ( ) \_\_\_\_\_ 6. Email: \_\_\_\_\_

**B. Household Information: 2013 Tax Year** *(Please supply a copy of your Federal 1040 form)*

1. Number of family members living in household: \_\_\_\_\_ Parent/Guardian: \_\_\_\_\_ Children/Dependants: \_\_\_\_\_ \*Other: \_\_\_\_\_  
\* If there are adults living in your household besides the parent/guardian you must include them in this application and provide their Federal Tax documentation.
2. Marital status of parent/guardian(s):  Married  Single  Widowed  Divorced (month/year) \_\_\_\_\_  Separated (month/year) \_\_\_\_\_

**C. Income Information**

All adults residing in the household with the student(s) MUST report their income on this application and attach their 2013 Federal Income tax return.

Income Sources	1st Parent/Guardian	2nd Parent/Guardian	Other
1. Adjusted Gross Income from 2013 Federal 1040:			
2. Social Security Benefits, SSI or Disability:			
3. Any Additional Income			

**D. Student Information: Fill in section below entirely for the child(ren) who attend the specific school receiving scholarships from Bridge**

**Student A.**

1. Full Name: \_\_\_\_\_
2. Grade enrolled for 2014/2015 school year: \_\_\_\_\_
3. Relationship to guardian:  Child  Stepchild  Other \_\_\_\_\_
4. Gender:  Male  Female
5. Date of Birth (MM/DD/YY): \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_
6. Was this child a full-time student in a Pennsylvania school in 2013/2014?  Yes  No (If answer is YES, please check appropriate box below.)
7. Was this child a full-time student in a public or private institution?  Public  Private
8. School attended in 2013/2014: \_\_\_\_\_
9. School City \_\_\_\_\_
10. School attending in 2014/2015: \_\_\_\_\_
11. School City \_\_\_\_\_

**Student B.**

1. Full Name: \_\_\_\_\_
2. Grade enrolled for 2014/2015 school year: \_\_\_\_\_
3. Relationship to guardian:  Child  Stepchild  Other \_\_\_\_\_
4. Gender:  Male  Female
5. Date of Birth (MM/DD/YY): \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_
6. Was this child a full-time student in a Pennsylvania school in 2013/2014?  Yes  No (If answer is YES, please check appropriate box below.)
7. Was this child a full-time student in a public or private institution?  Public  Private
8. School attended in 2013/2014: \_\_\_\_\_
9. School City \_\_\_\_\_
10. School attending in 2014/2015: \_\_\_\_\_
11. School City \_\_\_\_\_

**E. Certification Signature**

I (we) hereby agree that any scholarship award will be used exclusively for the payment of tuition at the school designated above, and that the school is authorized to verify that the designated student is enrolled in said school and that the school's tuition has been paid. I (we) further agree to notify Bridge Educational Foundation, Inc. immediately should the student no longer be enrolled in said school for any reason. I (we) also agree to repay Bridge Educational Foundation, Inc. any tuition amounts, paid for by a scholarship grant from Bridge Educational Foundation, Inc., which are refunded to me (us) by the school by reason of the fact that the student is no longer enrolled in said school. I understand that the deliberate misrepresentation of the information may result in the scholarship being denied or revoked, and may subject me to prosecution under applicable State and Federal laws.

Signature(s) of parent/guardian: \_\_\_\_\_ Dated: \_\_\_\_\_

Please send the completed application and tax information back to your school.

# Bridge Educational Foundation

## Narrative Description of Policies: Pre-K and K-12

The Bridge Educational Foundation ("Bridge") will award at least 80% of its annual receipts as scholarships to those individuals who meet the eligibility criteria specified in §2002-B of the Pennsylvania Public School Code, as enacted by Pennsylvania Act 2001-4, as amended.

To be eligible for a scholarship award, a student must be enrolled in grades Pre-kindergarten through 12 at a lawfully-operating pre-kindergarten program or non-public school located in the Commonwealth of Pennsylvania. The school must be one at which a student may fulfill the compulsory attendance requirements of the Commonwealth of Pennsylvania and which meets the applicable requirements of Title VI of the Federal Civil Rights Act of 1964.

The Foundation will operate its pre-kindergarten scholarship program as a separate segregated fund from its K-12 scholarship program. The Foundation will not limit the awarding of scholarships solely to students of one school or pre-kindergarten program.

A Pre-kindergarten Program is a program of instruction for students at least three years of age operated by a school, or in conjunction with a school, located in the Commonwealth of Pennsylvania that utilizes a curriculum aligned with the curriculum of the school with which it is affiliated, and which provides a minimum of two hours of instructional and developmental activities per day at least 60 days per school year. A provider of a Pre-kindergarten program must demonstrate to the Foundation that it will operate an eligible program by receiving a letter from a school in which the school confirms that the curricular content and methods of instruction at the Pre-kindergarten program are consistent with those used at the school and that the program has agreed to align its instructional and developmental activities so that its students would be prepared to enter the school's kindergarten when and if they chose to do so. A copy of this letter will be submitted to the Department of Community and Economic Development for each Pre-kindergarten program that Bridge Educational Foundation provides scholarships for eligible children to attend.

Scholarships will be awarded on a racially non-discriminatory basis, and will not equal or exceed 100% of the amount of tuition and fees charged to non-scholarship students by the school at which the student is enrolled.

Scholarships will not be awarded to students for athletic purposes.

No scholarship will be awarded to a child or dependent of any individual contributor or Board member of the Bridge Educational Foundation. Nor may any contributor designate any particular student to be the recipient of any scholarship award.

All statutorily-eligible Pennsylvania citizens may request to receive a Bridge Educational Foundation scholarship. Non-public school principals, or other administrative staff, may also request that eligible families with children currently attending their schools be considered for Foundation scholarships. However, if EITC scholarships become available, each individual family will be required to submit an application and qualify individually.

Individual families who contact the Bridge Educational Foundation requesting scholarship assistance must submit a Formal Request Statement between May 1<sup>st</sup> – June 30<sup>th</sup>. Potential individual applicants who contact Bridge will be directed to our website at [www.bridgeedu.org](http://www.bridgeedu.org). Potential applicants will be asked to review the Policies and Procedures and submit a Formal Request

Statement during the timeframe above. The template for the request states the following: The number of dependents living in their household; their children's tuition costs; that their income is within the limits of PA Act 2001-4, as amended; and that they will comply with the Policies and Procedures of the Bridge Educational Foundation should they be approved and receive a Bridge EITC scholarship.

Bridge will commit scholarships to individual families on a "first come, first served" basis. Once these scholarships are exhausted for the Foundation's fiscal year, Bridge will notify the families who remain on the Request List directing them to resubmit a Formal Request Statement beginning on May 1<sup>st</sup> of the next year.

If the interested citizen is a non-public school principal or other administrative staff member from the school, they must submit a Formal Request Statement to the Bridge Educational Foundation on behalf of the school's eligible families. The school official must review the Policies and Procedures and complete a Formal Request Statement stating the estimated number of eligible families; tuition costs and that the school and the eligible families will comply with the Policies and Procedures of the Bridge Educational Foundation should their families receive a Bridge EITC scholarship to be awarded toward their tuition accounts. The Formal Request Statement will be added to the appropriate school year's Request List. A school official may be contacted any time of the year regarding scholarships for their families.

Individual applicants and schools with eligible families will only be considered for an EITC scholarship if a signed Formal Request Statement is on file with the Bridge Educational Foundation. Bridge Educational Foundation scholarships do not renew annually. Applicants must submit a new Formal Request Statement each year beginning on May 1<sup>st</sup> – June 30<sup>th</sup> and sign the request letter accordingly.

The Bridge Educational Foundation Scholarship Approval Committee will at the annual Board Meeting to review both individual applicants and schools that have submitted Formal Request Statements. The Scholarship Approval Committee will verify the statutory financial eligibility of the family when determining if the Foundation is able to provide a scholarship award.

During the first board meeting of the fiscal year (July 1<sup>st</sup> – June 30<sup>th</sup>), the Scholarship Approval Committee will approve a list of schools that our donor companies selected in order to allocate their EITC funds to their families. The Committee may also designate a pot of funds, if funding is available, to be distributed to individuals families who submitted a Formal Request Statement for the upcoming school year. Upon the decision of the Committee, staff at the Bridge Educational Foundation will contact a predetermined amount of families who submitted a Formal Request Statement.

If an individual family is selected by the Committee to receive a scholarship award, the amount of the scholarship award will also be determined by the Committee. In the case where a school is soliciting assistance on behalf of its students, the school principal may also advise the Scholarship Approval Committee of extraordinary financial circumstances facing qualified families. The Committee may take into account any stated preferences of a contributing donor when selecting a school at which scholarships may be awarded. However, individual families from the school must submit applications and qualify individually.

After the Committee has determined the amount of scholarships that are available for individual families and qualified families have been selected the Bridge Educational Foundation staff will contact the selected families and will begin the application process with the family or school.



Families will be given an application packet to complete. Also, after the Committee has approved the school selections made by the contributing donor companies the Bridge staff will contact the school official to start the application process.

Applicants for scholarship awards must submit the Foundation's application form, including proof of household income in the form of a Federal tax return filed by all members of the household for the most recently completed calendar year. Applications, all records concerning eligibility for scholarship assistance, and all information concerning household income, shall remain confidential and shall not be disclosed for any purpose unrelated to the determination of eligibility for scholarship awards.

If a household did not file or cannot locate their tax return, the Foundation requires a letter written by the applicant, which must itemize all sources of income for every adult living in the household and the number of dependents living in the household. This letter must be signed in the presence of a notary public.

If an amount has been allocated by the Committee for scholarships for families at one particular school it is the responsibility of the school to distribute the policies and procedures, applications and community service forms to the families. The school must ensure that the families that apply for the scholarship will comply with the Foundation's policies and procedures. It is the school's responsibility, with the assistance of the Foundation, to locate eligible families that are in need of financial assistance. The school must notify families of the deadline that applications are due and then collect the applications and tax information. The applications and tax information are due in one packet to the Foundation by a predetermined date set by the Foundation. Should the school fail to locate a sufficient number of eligible families to apply for scholarship assistance, the unused amounts designated for scholarships will lapse and Bridge may allocate those scholarship funds for eligible families at other non-public schools.

The Foundation will follow two check cycles during its fiscal year. The first check request cycle will fall on the second Thursday of November and the second check cycle is on the third Thursday of March. The package of applications and tax forms will be due a minimum of 30 days prior to the check request date. Special circumstances may arise during the year when checks may have to be cut at a different time. This will be done only with the consent of the Scholarship Committee.

The school must also complete an Excel spreadsheet with the applicants' information, including the families' tuition costs and a recommended award amount. The recommended award amount must not pay an applicant's entire tuition charged by the school. Any other financial assistance must be taken into account when determining the recommended award.

Once the Foundation has reviewed the package of applications and the corresponding spreadsheet from the school administrator, the school will be notified of any additional information that is needed to approve a family. The school will also be notified if any family does not meet PA Act 2001-4 income eligibility requirements. In that case, it is the school's responsibility to notify the applicant that he/she is not eligible and the school may select another family to apply or redistribute the scholarship award amount to another eligible family already on the approved spreadsheet.

Once the file is complete and all families have been approved and cross-referenced to the corresponding spreadsheet, the school is notified and told when the scholarship check will be requested from the Bridge Educational Foundation accountant. Upon receipt of the check from the accountant, the Foundation will deliver the check, made payable to the school, with a list of qualified families who have been approved to receive the scholarships. Along with the check, the school will

receive a receipt that they must complete and mail back to the Foundation confirming receipt of the scholarship check. After the receipt has been received, the Foundation will notify each family that has been awarded a scholarship via a letter informing them of the specific award amount that they are receiving.

Families who are selected for a scholarship award must agree to perform community service hours during the school year, for the benefit of an organization that is recognized as exempt from Federal taxes under Internal Revenue Code Section 501 (c) (3). A family with a student in a Pre-kindergarten program will be required to complete 10 hours and a family with a student in grades K-12 are required to complete 40 hours. The school that a scholarship recipient attends must agree to certify whether the family has performed the requisite number of community service hours. Any family who does not perform the requisite number of community service hours will not be eligible to receive scholarship assistance, if offered, for the following school year. It is requested that the school collect all completed volunteer forms throughout the school year and mail them to the Foundation in one (1) package. The families have one year from the time they receive their scholarship award to complete the required hours.

Any family that receives a scholarship and any school that works with the Foundation on scholarships must notify the Bridge Educational Foundation immediately if a student in that family or at that school withdraws prior to completing the school year. Those who apply for scholarship assistance must agree to repay the Foundation any amounts of scholarship assistance which are refunded to them by a School by reason of the withdrawal of the student from that school prior to the conclusion of the school year. Schools which enroll scholarship recipients must agree to reimburse the Foundation, on a pro rata basis, for all amounts of scholarship assistance paid on behalf of a student who withdraws from that School prior to the conclusion of a school year, to the extent such amounts have not been refunded to the student's parents. If a school has other families that have children currently enrolled that have already gone through the Foundation's application process and have been approved, they may also prorate the award and transfer the remaining award to an already pre-approved family with the permission of the Foundation. The total award amount may not exceed the child(ren)'s tuition taking into account all other financial aid and scholarship including financial aid and scholarships secured after the initial Bridge Foundation scholarship award.

The Foundation will maintain full and accurate records of contributions received, and of the expenditure of those contributions, for a period of not less than three years.

*[PLEASE FOLLOW THIS TEMPLATE EXACTLY AS IT APPEARS AND COMPLETE IT WITH YOUR PERSONAL INFORMATION AND THEN HAVE THIS FORM NOTARIZED]*

{INSERT DATE}

Kelly Gerdes  
Bridge Educational Foundation, Inc.  
Post Office Box 222  
Harrisburg, PA 17108-0222

Dear Ms. Gerdes:

Per your request, I am supplying this letter to serve as an attachment to my scholarship application for a Bridge Educational Foundation scholarship for the 2014-2015 school year at North American Martyrs School. As you can see I have had this letter notarized.

My household's only sources of income for the 2013 tax year are from the following:

- 1) Example: Child support - \$500 per month; totaling \$6,000
- 2) Example: My child, Kelly's Social Security - \$13,000 per year
- 3) Example: Mother in law, Jane Smith's income from ABC Company - \$30,000

There were {INSERT NUMBER} children that lived in our household during the above mentioned tax year.

Sincerely,

\_\_\_\_\_

