

**ALAN AND RUTH STEIN
EDUCATIONAL ASSISTANCE PROGRAM
APPLICATION PACKAGE**

APPLICATIONS ARE DUE August 10, 2017! LATE APPLICATIONS will be referred to the next round in 2018. PLEASE PLAN ACCORDINGLY. UPLOADING APPLICATION DOCS AND ATTACHING DOCS CAN TAKE TIME and SOMETIMES REQUIRE TECHNICAL ASSISTANCE. WE SUGGEST YOU SUBMIT APPLICATIONS ONE WEEK PRIOR TO THE DEADLINE TO AVOID MISSING THE DEADLINE. NOTE: APPLICATIONS SUBMITTED PAST THE DUE DATE DUE TO TECHNICAL ISSUES (EMAIL ATTACHMENTS, FILES BOUNCED BACK, ETC.) WILL BE REFERRED TO THE NEXT ROUND IN 2018.

PLEASE TYPE OR PRINT CLEARLY using only the front of each page. Do not write in the margins. Attach additional pages as needed. Fill in the entire application as completely as possible. Incomplete applications and applications received after the deadlines will not be considered. This scholarship is competitive. Typically the review committee makes about 15 awards per round.

If you print, PLEASE PRINT CLEARLY! If we are unable to read your email address, we will be unable to contact you and your application will be removed from consideration. Thank you!

Personal Information

Name _____
Last First Middle

Date of Birth _____ Age _____ Place of Birth _____
City/State Country

Social Security Number (or Taxpayer ID #) _____

Sex M F Prefer not to disclose

Race/Ethnicity (Optional, please check all that apply.)

- African American Latino/a Caucasian
 Asian American or Pacific Islander Native American or Native Alaskan
 Other _____

Property Name _____
(This is the name of the apartment building in which you live, such as North Point Village Apartments.)

Address _____
Street Apt. # City State Zip

Home Telephone _____ Cell phone _____

E-Mail Address **(PRINT CLEARLY)** _____

Household size _____

I live alone I live with family I live with roommates

No. of Dependents/Ages _____

Estimated Household Income for 2017 \$ _____

Estimated Personal Income for 2017 \$ _____



Education and Employment

Are you currently (check all that apply):

- A full-time student
- A part-time student
- Employed full-time
- Employed part-time
- Unemployed
- Other (please describe): _____

Are you currently attending one of the following? (Check only if one applies)

- 2-year College
- 4-year College
- Graduate school
- Vocational school
- Other _____

If you are currently in school, please provide the name of the college/university/vocational school you are currently attending: _____

Name City

If you are *not* currently in school, please provide the name of the college/university/vocational school you plan to attend/have applied for: _____

Name City

What is your current educational goal? (for example: A.S. in Construction Management, B.A. in Biology, Certificate in Licensed Vocational Nursing).

From the date of application for these funds, how long will it take to complete your educational goal?

Years Months

Education

Please list your current or most recent place of study first.

SCHOOL & LOCATION	AREA OF CONCENTRATION	DATES ATTENDED	DEGREE/YEAR

Work Experience and/or Volunteer Experience

Please list your current or most recent place of employment first and focus on experience relevant to your career/educational goal.

POSITION/TITLE/ROLE	ORGANIZATION & LOCATION	DATES	FULL-TIME, PART-TIME, or VOLUNTEER



Financial Plan

The *Alan and Ruth Stein Educational Assistance Program* offers **scholarships** and **awards**.

Scholarships may only be applied toward tuition, fees, books, and supplies required by the class.

Awards may be applied toward any other expense that may arise as you pursue your educational and career goals. The main difference between a scholarship and an award is that scholarships are not taxable. If you choose to apply for an award, you must count any financial assistance that you receive as part of your gross income. Please check below if you will be applying for a scholarship or an award. You may apply for both a scholarship and an award, but you must specify all expenses in your educational budget (see below).

- Scholarship** (Tuition, fees, books, and supplies required for courses of instruction ONLY. Scholarships may be paid directly to educational institution.)
- Award** (Other education-related equipment and expenses.)

Please submit a budget of your educational plan, including how much your plan will cost in total for one year and how much you are requesting. (*Applications submitted without a budget will not be considered.*)

Sample Educational Budget: 1-year full-time student

ITEM	COST	REQUEST
Tuition: City College of San Francisco	\$ 3,900	\$ 0
Books and Supplies	\$700	\$700
Childcare	\$3,000	\$1,500
Transportation	\$ 800	\$800
<i>TOTAL</i>	<i>\$8,400.00</i>	<i>\$3,000.00</i>

- *In this sample, the student has applied for Cal Grants for tuition assistance and has put some money aside for childcare.*
- *Note that a total scholarship or award falls between \$1,000 and \$6,000. If your request exceeds this amount and you are chosen as a recipient, the most you can expect to receive would be \$6,000.*
- *Personal expenses such as food and rent are not allowable expenses under the award or the scholarship and should not be included as costs or as part of your request.*

Applicant's Educational Budget- REQUIRED RESPONSE

For how long is your educational budget designed?

- One year One semester One quarter
 Other _____

ITEM	COST	REQUEST
<i>TOTAL</i>		

Please fill in the chart below to help us better understand whether there are other sources of funding you are seeking to assist you in paying for school in the coming year.

We understand that some schools do not participate in the Federal Financial Aid program and that not everyone qualifies for financial aid. If you do not qualify for financial aid or it is not offered at your school or for your program please check this box.

If you have not yet received your financial aid awards notice(s), please check this box and show amounts you received for the most recent school year or estimates.

Source of Funds		Total Amounts
<input type="checkbox"/>	Work or work study	\$
<input type="checkbox"/>	Savings/family assistance	\$
<input type="checkbox"/>	FAFSA*	\$
<input type="checkbox"/>	BOG Waiver**	\$
<input type="checkbox"/>	EOPS Program**	\$
<input type="checkbox"/>	Chafee Grant	\$
<input type="checkbox"/>	Other Awards/Grants from my school	\$
<input type="checkbox"/>	Subsidized student loans	\$
<input type="checkbox"/>	Unsubsidized student loans	\$
<input type="checkbox"/>	Other Scholarships	\$
Total All Other Funding Sources:		\$

* For info on applying for aid through FAFSA (The Free Application for Federal Student Aid) see <http://www.fafsa.ed.gov/> . It is free to apply.

** For info on applying for Extended Opportunity Programs and Services (EOPS) and/or the Board of Governors Waiver (BOGW) visit your college Financial Aid Office.

Questions? Please contact Stein Administrator, Sara Flint at (415) 321-3595.

Letters of Recommendation

We ask for two letters of recommendation from persons (e.g. a teacher, mentor, present or past employer) who are qualified to give us an evaluation of your character, ability, accomplishments, and potential for success in your chosen career path. Please do not include letters from relatives. Letters may be mailed separately from the application, but must be received no later than August 10, 2017. Please list the recommenders' names and relationships to you below.

Name	Relationship to Applicant
------	---------------------------

Name	Relationship to Applicant
------	---------------------------

Please use the attached form (2 copies) when submitting a letter of recommendation. Fill in your name on the top line and then give the form to your recommender so that she or he can complete the remainder of the form. Once the letter is written the recommender may mail the form to the address noted or return the form to you to submit with the remainder of your application.

Letter of Recommendation Form

Thank you for agreeing to write a letter of recommendation for _____,
(Applicant's name here.)

who is applying for a scholarship through the Alan and Ruth Stein Educational Assistance Program. This program provides funds for residents of properties affiliated with the non-profit affordable housing developer, BRIDGE Housing Corporation. BRIDGE residents planning to attend a public or private accredited community college, university, approved vocational school, certification program, or job-skills program are invited to apply. Grant recipients are selected based on financial need, a personal commitment to their stated educational and career goals, and a clear educational and financial plan for achieving these objectives. Recipients typically receive awards of \$1,000 - \$6,000.

Because this program is highly competitive, you have been asked to supply some background information for this candidate's application. Please take a moment to answer the following questions to help us in our decision-making process. You may use this form or attach a letter in another format. *(Note: This letter must be received **no later than August 10, 2017 to be considered.**)*

Describe your relationship to the applicant. How long have you known the applicant?

In what ways has the applicant been working towards the educational goals she/he has expressed during the time that you have known her/him? What is special about this applicant and her/his goals?

What factors in the applicant's background and/or experience will most contribute to the applicant's success in her/his chosen field.

In your opinion how would the applicant benefit from a scholarship award in the amount of \$1,000 - \$6,000?

Letter of Recommendation Form Continued

Please add any further comments that might assist us in getting to know this applicant. Use this space to comment on areas in which the applicant could improve and areas in which the applicant excels. (Attach another page if needed.)

We've moved. Please note our new address below.

When complete, please return this form to the applicant, email to steinscholarship@bridgehousing.com

or mail to:

BRIDGE Housing Corporation
Attn: Stein Selection Committee
600 California Street, Suite 900
San Francisco, CA 94108

Signature of Recommender

Date

Letter of Recommendation Form

Thank you for agreeing to write a letter of recommendation for _____,
(Applicant's name here.)

who is applying for a scholarship through the Alan and Ruth Stein Educational Assistance Program. This program provides funds for residents of properties affiliated with the non-profit affordable housing developer, BRIDGE Housing Corporation. BRIDGE residents planning to attend a public or private accredited community college, university, approved vocational school, certification program, or job-skills program are invited to apply. Grant recipients are selected based on financial need, a personal commitment to their stated educational and career goals, and a clear educational and financial plan for achieving these objectives. Recipients typically receive awards of \$1,000 - \$6,000.

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Letter of Recommendation Form Continued

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We've moved. Please note our new address below.

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BRIDGE Housing Corporation
Attn: Stein Selection Committee
600 California Street, Suite 900
San Francisco, CA 94108

Signature of Recommender

Date

Application Procedures

1) All application materials, including two (2) letters of recommendation, must be received by **August 10, 2017. Only complete applications will be considered. Complete applications will contain a completed application packet as well as the two letters of recommendation.**

2) Applications can be emailed to steinscholarship@bridgehousing.com.

Note: If you email your application, you will receive a notice it has been received. If you do not receive a receipt notice, this means it has not been received and we recommend calling the Stein hotline at 415-321-3563

Or you can mail your packet to the following NEW address:

BRIDGE Housing Corporation
Attn: Stein Selection Committee
600 California Street, Suite 900
San Francisco, CA 94108

3) All questions should be directed to Sara Flint at (415) 321-3563.

4) Finalists may be interviewed by the Alan and Ruth Stein Educational Assistance Program Committee.

5) Grant recipients will be informed in September for Funding Round 1 and in February for Funding Round 2, and awards distributed based on individual educational plans. Grant recipients may be asked to participate in a donor and awardee recognition event later in the year.

6) Those selected recipients will have funds disbursed as soon as recipient acceptance paperwork is completed.

7) The Alan and Ruth Stein Educational Assistance Program is a competitive scholarship program. We regret that, although the majority of applicants are qualified, not everyone who applies will receive an award.

Checklist

We will only review **complete** applications. So, before you seal your envelope please check that each of the following items are included:

- The completed application form (pages 1-8): including:**
 - Personal Information
 - Education and Employment and/or Volunteer History
 - Financial Plan
 - Applicant's Educational Budget (pages 4 and 5)
 - Statement of Purpose
 - Biographical Statement
 - Applicant's Signature

- Two letters of recommendation (pages 9 – 13).**

APPLICATIONS MUST BE RECEIVED August 10, 2017
NO EXCEPTIONS

Applications can be emailed to steinscholarship@bridgehousing.com

Note: If you email your application, you will receive a notice it has been received. If you do not receive a receipt notice, this means it has not been received and we recommend calling the Stein hotline at 415-323-3563 to confirm it has been received. Assume it has not been received if you do not receive a confirmation.

Or you can mail your packet to the following NEW address:

BRIDGE Housing Corporation
Attn: Stein Selection Committee
600 California Street, Suite 900
San Francisco, CA 94108

The Alan and Ruth Stein Educational Assistance Program *Frequently Asked Questions*

1. Description of Program

The Alan and Ruth Stein Educational Assistance Program is designed to assist residents in the pursuit of educational and career goals and to enable socioeconomic mobility. This program provides grants to residents of BRIDGE-affiliated affordable family properties. Funding for this program is provided by friends and associates of BRIDGE, people who have been involved with our work and believe in the importance of educational opportunity. Grants will typically range from \$1,000 to \$6,000.

2. Who can apply?

Any resident who is low-income, lives in a BRIDGE-affiliated affordable family property and is at least 16 years of age is eligible to apply. Applicants do not have to be the head of household. The Program is available for adult residents pursuing post-secondary education or vocational classes. The Program is also available to high school students who have applied for college admissions in the fall, or are seeking another form of education such as a certificate program. Grants will only be made to residents in good standing.

3. What is the application deadline?

Applications must be received by **August 10, 2017**. Applications must include two (2) letters of recommendation to be considered complete. We strongly recommend that you refer to the checklist for a list of what constitutes a complete application. This deadline is the same for those who request translated applications.

4. My roommate would like to apply for a grant, but he has limited English skills. What should he do?

Residents with limited English skills may request an application in Spanish, Russian, Vietnamese, Chinese, or Farsi. Applications may be completed in the applicant's native language, and will be translated into English for evaluation purposes. **Applications must be received by August 10, 2017. Translated applications in each language are also available on our website www.bridgehousing.com during each application round.**

5. How will recipients be selected?

Recipients will be selected based on personal commitment, financial need, and a clear, realistic educational and financial plan. Applications will be reviewed by a committee of BRIDGE staff and board members. Finalists may be interviewed, and recipients will be selected at the discretion of the committee. The Alan and Ruth Stein Educational Assistance Program is a competitive scholarship program. We regret that not everyone who applies will receive an award.

6. *Can a family member who is not a BRIDGE resident apply for a grant?*

No. The Alan and Ruth Stein Educational Assistance Program is only available to current residents of BRIDGE-affiliated properties.

7. *How can the grants be used?*

Grants may be applied toward expenses that will arise in the pursuit of educational objectives. These costs may include tuition, books, educational equipment such as computers, transportation costs, and childcare expenses. However they may not include food, rent, or other miscellaneous personal items that are not directly related to attending school.

8. *If I receive a grant, does it count toward my income?*

Applicants may apply for a “scholarship” or an “award.”

a) Allowable expenses for “qualified scholarships,” determined by the IRS, include:

- Tuition and fees required for the enrollment or attendance of a student at an educational organization.
- Fees, books, supplies, and equipment required for courses of instruction at such an educational organization.

b) Awards may be applied to cover additional costs, such as transportation, childcare, and educational equipment not required for but incurred during courses of instruction. These costs will count as part of the recipient’s gross income, and will be taxable.

9. *I need assistance paying for tuition as well as other education-related expenses. Can I apply for both a scholarship and an award?*

Yes. Please specify your exact request on your educational budget and check both the *Scholarship* and *Award* selection boxes.

10. *Will this grant affect my status as a BRIDGE resident?*

Applicants living in properties financed through the Low-Income Tax Credit program should be aware that the full-time student status rule still holds: households cannot be comprised only of full-time students. In addition grants will only be made to residents in good standing.

11. *When will grants be distributed?*

Funds will usually *not* be distributed in a single lump sum. Funds will be distributed to recipients and/or educational institutions based on individual educational plans, generally with one check being mailed in time for each semester. After initial awards are released, the next set(s) of funds will not be released until the first progress report and receipts from the initial semester are received (See below).

12. *If I receive a grant, do I have to report on my progress?*

Yes. BRIDGE requires all recipients to submit biannual reports (every six months) on their progress. Applicants who request and submit their application in their native language may also submit progress reports in their native language.

13. *What if my educational plans change?*

We ask that recipients submit biannual reports (every six months) that describe how grant funds are being used. Any change in your educational plans and funding needs during the award period should be reflected in the bi-annual report. The next round of funds will not be released until the bi-annual report is submitted.

14. *What if I move during the award period?*

If you are a resident when the initial award is distributed, your award will not be affected if you move out. However, any funds not yet disbursed will be forfeited and you will not be eligible to apply next year as a non-resident.

15. *If I do not receive an award this year, can I apply in the future?*

Yes. The *Alan and Ruth Stein Educational Assistance Program* will be available on a semiannual basis.

16. *Can I apply for a multi-year award?*

Although applicants should submit their entire educational plan, funding will only be provided for one year. Awardees may apply for a renewal of funds the following year, but there is no guarantee of future funding.

17. *What else should I know about this program?*

If awarded a grant, you may be asked to participate in an awardee and donor recognition event in 2017.