

Caregiver Grants

Dear Applicant,

We at Road Scholar acknowledge the weighty responsibility you and all adults who serve as family caregivers for ill or disabled relatives carry. The warm, welcoming and friendly nature of our learning adventures can provide a much-needed respite from the emotional and physical demands inherent in your caregiver service. We're committed to helping you offset the costs of arranging substitute care while you attend a program. Thanks to the generous support of our donors, we are able to do just that by awarding Caregiver Grants.

If you can demonstrate caregiver status for an ill or disabled family member and are able to document the expenses of providing this care, you can apply for a Caregiver Grant.

If you meet the caregiver status requirements, we encourage you to submit an application. It takes us between four and six weeks to review your application. The application is your chance to tell us about yourself and what the opportunity to go on a program would mean to you.

Pick a Road Scholar learning adventure in the United States you'd like to attend and use the personal statement section of the application to tell us why it inspires you and how the financial and personal responsibilities of serving as a caregiver make it difficult for you to attend without a Caregiver Grant.

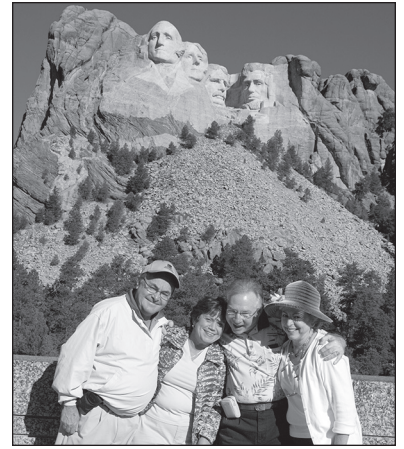
If your application is approved, we'll award you a Caregiver Grant toward the cost of the program. **Please read the sections on the back for important information about the application requirements and what to expect if your application is approved.**

We're so glad you want to experience the joys of lifelong learning with Road Scholar. We can't wait for you to join us.

Sincerely,



James Moses
Road Scholar President



THE BASICS: WHAT YOU NEED TO KNOW ABOUT CAREGIVER GRANTS

Which programs are eligible for Caregiver Grants?

You can apply for a Caregiver Grant toward the cost of any program that meets all of the following criteria:

- Takes place entirely in the United States.
- Costs NO MORE than \$1,400.

Who can apply for a Caregiver Grant?

We accept Caregiver Grant applications from anyone who meets all of the following criteria:

- At least 50 years of age.
- Lives in the United States.
- Meets the eligibility requirements.
- Has not been awarded a Road Scholar Grant in the last two years.

What happens if your application is approved?

Here's how the Caregiver Grant works:

- The Caregiver Grant is applied toward the cost of the program you selected in your application.
- The amount of the Caregiver Grant will be between \$200 and \$900, determined by your household income.
- You will pay the balance of the program cost after the Caregiver Grant has been applied.
- At minimum, you will pay a \$100 deposit, no matter the program cost and amount awarded.

What happens if you send in an incomplete application?

To make sure your application is reviewed, please ensure it is complete.

- Your application must include the program number and date of a specific United States program that costs \$1,400 or less.
- If you are awarded a Caregiver Grant, you must apply it toward the program and date specified in your application. You cannot reserve it for a program to be selected in the future.

What if your plans change?

We know that in rare instances a grant recipient may have to adjust their travel plans. Here are some things to keep in mind:

- Remember: Your program deposit is non-refundable and is used to cover our costs if you have to cancel your program or transfer to another.
- If you cancel your enrollment in the program, the Caregiver Grant becomes void.
- If Road Scholar cancels your program, the Caregiver Grant can be transferred to another program without fees.
- If after enrollment you decide to transfer to another eligible program, the Caregiver Grant may be transferred along with the enrollment.
- Your Caregiver Grant can't be transferred to another person.

Is there anything the Caregiver Grant doesn't cover?

The Caregiver Grant is applied to the cost of the program only. It does not cover ...

- The cost of transportation to and from the program.
- Any additional material costs or expenses.

What are you expected to do when you return from your program?

When you get back from your adventure, we ask that you do a few things for us. If you fail to do the following, **we may not award you a Caregiver Grant in the future.**

- Complete an evaluation after the program.
- Write a thank-you letter to the donor(s) who funded your Caregiver Grant.
- Post an online review, photos and a blog. We can help you with this if you need.
- Allow Road Scholar to use your personal statement and thank-you letter when we report to donors and tell others about our Caregiver Grants.

Please save this page for future reference after submitting the attached application.

Caregiver Grant Application

INSTRUCTIONS

Please read these instructions carefully before applying for a Caregiver Grant.

Please complete one application per person. In order to be reviewed by the Caregiver Grant Committee, all parts of the application must be complete, including the program number and date for which you are applying. Please answer the questions thoughtfully and thoroughly. Your answers will be used to determine eligibility, and incomplete applications will not be reviewed.

Note: Please remember to sign and date this application on the final page.

Please allow 4-6 weeks for the Caregiver Grant Committee to review your application and send a response.

If you have any questions regarding Caregiver Grants, you may contact Participant Services by emailing registration@roadscholar.org or by calling toll free at (877) 426-8056, Monday through Friday, 8 a.m. to 7 p.m., ET.

All fields are required.

PERSONAL INFORMATION

Name: _____ Date of Birth: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Telephone Number: (_____) _____

Email Address: _____

How did you learn about Road Scholar?

INFORMATION OF PERSON FOR WHOM YOU PROVIDE CARE

Name: _____

Relationship: _____

FINANCIAL INFORMATION *(All information will be kept strictly confidential.)*

Total Household Income (\$) Last Year: \$ _____

Include all sources of income, including salaries, wages, interest, IRA distributions, pensions and gross social security benefits.

Did you file an income tax return for the previous year? Yes No

If yes, please attach a copy of pages 1 and 2 of your last federal income tax filing.

If no, please attach a copy of your last Social Security Benefit Statement.

Note: The Caregiver Grant Committee will deny your application if you do not attach validation of yearly income.

PROGRAM INFORMATION

Please provide the following information about the program for which you want to register:

Program Name: _____

Program Number: _____ Program Date: _____

Double or Single Occupancy: _____

CAREGIVER EXPENSE INFORMATION

Please list, detail and provide the estimated cost of substitute caregiver arrangements necessary to allow you to attend the program you have chosen and attach copies of relevant documentation (i.e. Hourly Respite Care Services or the cost of an airline ticket for another family member to fly to your home to provide substitute care).

PERSONAL STATEMENT

The Road Scholar mission is to inspire adults to learn, discover and travel. Our learning adventures engage expert instructors, provide extraordinary access, and stimulate discourse and friendship among people for whom learning is the journey of a lifetime. The purpose of the personal statement is to help determine why Road Scholar should award you a Caregiver Grant. Please tell us, in specific detail, why you want to learn with Road Scholar and participate in this particular program and how the experience would impact you as a caregiver. Please include any special circumstances or personal experiences that have influenced your program selection and/or your request for financial aid.

Note: 150-500 words are required. Please attach a separate sheet. Incomplete applications will not be reviewed.

TELL US ABOUT YOURSELF

Are you: Married Divorced or separated Widowed Single, never married

Gender: Female Male

Please indicate your highest level of educational achievement (select one)::

- Some High School
- High School Diploma
- Some College/University
- Associates Degree
- College/University degree
- Master’s or Professional degree
- Doctoral degree
- Other (specify) _____

Please describe what it is about Road Scholar programs and participants that attracts and interests you:

TELL US ABOUT YOURSELF *(continued)*

Employment Status: Employed Retired

If employed, please tell us in what profession/occupation; if retired, please tell us your last profession/occupation:

Do you currently volunteer? Yes No

Name(s) of volunteer organization(s) and/or activities:

Do you have an activity, hobby or avocation that's particularly important in your life? Yes No

If yes, please describe the activity and the benefits you experience:

TERMS AND CONDITIONS

Please read the following seven (7) sections at the beginning of this application and sign below to confirm that you have read and understand the terms and conditions therein:

“Which programs are eligible for Caregiver Grants?”

“Who can apply for a Caregiver Grant?”

“What happens if your application is approved?”

“What happens if you send in an incomplete application?”

“What if your plans change?”

“Is there anything the Caregiver Grant doesn’t cover?”

“What are you expected to do when you return from your program?”

By signing this application, you are agreeing to abide by the terms and conditions of the Caregiver Grant program; to allow Road Scholar to use your personal statement and thank-you letter in reporting to our donors (and the public at large) how donations to Road Scholar are being used; and to be identified in those materials by your first name, last initial, city and state (e.g. Mary S., Omaha, Nebraska).

Your financial and contact information will always remain completely confidential.

Signature: _____

Date: _____

Please send your completed application to:

Road Scholar
Attn: Caregiver Grant Committee
11 Avenue De Lafayette
Boston, MA 02111

Please use this checklist to ensure that you are submitting all of the information required for the Caregiver Grant Committee to review your application. Incomplete applications will not be reviewed.

- Verify your eligibility to receive a Caregiver Grant under the terms and conditions.
- Verify that your program selection is eligible under the terms and conditions.
- Complete all of your contact information.
- Fill out the entire Financial Information section.
- Provide the name, number and date of the program you have selected.
- Complete the 150-500 word personal statement.
- Sign and date the application.
- Enclose your financial documentation (your last federal income tax filing or your last Social Security benefit statement).

Road Scholar educational adventures are created by Elderhostel, the not-for-profit world leader in lifelong learning since 1975.