

Scholarships

Dear Scholarship Applicant,

Thanks to the generous support of our donors, every year we award scholarships to lifelong learners in need. Since our earliest days, we have set aside resources to ensure that adults with limited financial means would be able to experience a Road Scholar learning adventure. We are a true university of the world, and our scholarships can turn the dream of experiencing one of our thousands of educational travel adventures into a reality. Our scholarships also enhance the program experience for all participants by welcoming individuals with diverse life perspectives to fully participate in our learning communities.

Generally, scholarships are awarded to recipients whose household income is less than 80 percent of the median household income in their state of residency (see the enclosed table). Income eligibility alone doesn't guarantee a scholarship, nor does a household income higher than the guideline automatically disqualify you. You will also have the opportunity in a personal statement to tell us why you are requesting a scholarship. This may include special personal, financial or medical circumstances.

We encourage you to submit an application and share your story with us. Pick an eligible program you'd like to attend in the United States or Canada and use the personal statement section of the application to tell us why this program inspires you and what circumstances make it difficult for you to attend without a scholarship. This is your chance to tell us about yourself and what the opportunity would mean for you to go on a Road Scholar learning adventure.

We recommend that you submit your application at least 3 months prior to your selected program start date. If your application is approved, we'll award you a scholarship toward the cost of the program. **Please read the following sections 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 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 SCHOLARSHIPS

Who can apply for a scholarship?

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

- At least 50 years of age
- Lives in the United States
- Meets the financial eligibility guideline (see enclosed table) and/or demonstrates financial need in the personal statement
- Has not taken a Road Scholar program in the last two years and is not currently enrolled in a Road Scholar program

Which programs are eligible for scholarships?

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

- It costs NO MORE than \$2,500.
- It takes place in the United States or Canada. Please note that deposit requirements vary by program.
- Your application must include the program number and date of a specific program that costs \$2,500 or less.
- If you are awarded a scholarship, 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 happens if your application is approved?

Here's how the scholarship works:

- The scholarship is applied toward the cost of the program you selected in your application.
- The amount of the scholarship award will be up to \$2,000, based on the program cost and the required deposit.
- At minimum, you will pay the applicable deposit for the program selected.
- You will pay the balance of the program cost after the scholarship has been applied.

What happens if you send in an incomplete application?

To make sure your application is reviewed, please use the checklist at the end of the application. Incomplete applications cannot be reviewed. We will not be able to notify you if your application is incomplete.

What if your plans change?

We know that in rare instances a scholarship 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 scholarship becomes void.
- If Road Scholar cancels your program, the scholarship can be transferred to another program without fees.
- If after enrollment you decide to transfer to another eligible program, the scholarship may be transferred along with the enrollment. The corresponding transfer fees will apply.
- Your scholarship can't be transferred to another person.

Is there anything the scholarship doesn't cover?

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

- The cost of transportation to and from a 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 scholarship in the future.**

- Complete an evaluation after the program.
- Write a thank-you letter to the donor(s) who funded your scholarship.
- Post an online review and photos. 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 scholarships.

These terms, conditions and eligibility are subject to change without notice.

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

GUIDELINES FOR HOUSEHOLD INCOME FOR ROAD SCHOLAR FINANCIAL ASSISTANCE

State	1 Earner	2 People
Alabama	\$39,285	\$44,991
Alaska	\$53,865	\$61,560
Arizona	\$43,695	\$49,950
Arkansas	\$36,225	\$41,400
California	\$53,748	\$61,470
Colorado	\$55,530	\$63,450
Connecticut	\$59,625	\$68,175
Delaware	\$49,275	\$56,295
District of Columbia	\$59,625	\$68,175
Florida	\$41,805	\$47,745
Georgia	\$44,370	\$41,715
Hawaii	\$57,060	\$65,205
Idaho	\$41,175	\$47,070
Illinois	\$50,760	\$58,005
Indiana	\$43,740	\$49,995
Iowa	\$46,350	\$52,965
Kansas	\$46,170	\$52,785
Kentucky	\$38,880	\$44,460
Louisiana	\$37,935	\$43,335
Maine	\$45,180	\$51,660
Maryland	\$59,625	\$68,175
Massachusetts	\$55,485	\$63,405
Michigan	\$44,910	\$51,345
Minnesota	\$55,485	\$63,405
Mississippi	\$34,695	\$39,645
Missouri	\$43,200	\$49,365

State	1 Earner	2 People
Montana	\$43,065	\$49,185
Nebraska	\$47,385	\$54,180
Nevada	\$45,135	\$51,615
New Hampshire	\$57,645	\$65,880
New Jersey	\$59,625	\$68,175
New Mexico	\$36,630	\$41,895
New York	\$52,020	\$59,445
North Carolina	\$42,300	\$48,375
North Dakota	\$50,625	\$57,825
Ohio	\$44,460	\$50,805
Oklahoma	\$39,600	\$45,225
Oregon	\$48,465	\$55,395
Pennsylvania	\$48,105	\$54,945
Rhode Island	\$52,515	\$60,030
South Carolina	\$40,995	\$46,890
South Dakota	\$45,090	\$51,525
Tennessee	\$40,995	\$46,845
Texas	\$44,865	\$51,255
Utah	\$50,940	\$58,185
Vermont	\$49,545	\$56,610
Virginia	\$55,440	\$63,360
Washington	\$54,675	\$62,505
West Virginia	\$36,000	\$41,175
Wisconsin	\$47,970	\$54,810
Wyoming	\$47,430	\$54,180

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Scholarship Application

INSTRUCTORS

Please read these instructions carefully before applying for a scholarship.

Please complete one application per person. In order to be reviewed by the Financial Assistance 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. Please use the checklist at the end of the application to ensure that your submission is complete and eligible.

We cannot review an application for a program with a start date of less than 6 weeks or an enrollment that has already been paid in full. The review of an application takes 4-6 weeks once it has been received by the committee; applications are reviewed in the order that they are received and cannot be expedited. Therefore, please ensure that you are submitting this application early enough to allow time to enroll and make your travel arrangements after you receive your award letter. We recommend that you apply at least 3 months prior to your selected program start date.

If you have any questions regarding scholarships, you may contact us by emailing scholarships@roadscholar.org.

PERSONAL INFORMATION

Name: _____ Date of Birth: _____

Street Address: _____

City: _____ State _____ Zip Code: _____

Telephone Number: (_____) _____

Email Address: _____

How did you learn about Road Scholar?

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: _____ Total Program Cost (Must be under \$2,500): _____

Deposit Amount: _____ (Please do not send your deposit or any money with this application)

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, penions, 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 Financial Assistance Committee will deny your application if you do not attach validation of yearly income. If you would like the Committee to consider any extraordinary personal, financial, medical or other circumstances or expenses, please describe them in detail in your Personal Statement.

YOUR PERSONAL STATEMENT

The purpose of your personal statement is to help determine your financial need as Road Scholar considers your application for a scholarship. We have a limited number of scholarships we can award every year, and your personal statement can be a deciding factor between one application and another.

Please tell us why you are requesting financial assistance to attend a Road Scholar program. If applicable, be sure to include as many details as possible about:

- Income challenges (current income sources, employment or income changes, layoffs, reasons for early retirement or part-time work).
- Medical expenses (extraordinary expenses incurred by you, a spouse, a dependent or a loved one for whom you are caring).
- Emergency or temporary expenses (economic hardships resulting from catastrophic events, natural disasters, accidents, funeral expenses, etc.).
- General challenges that constrain your monthly income or budget (i.e. barriers to working such as disability, lack of transportation, family obligations).
- Any other expenses or circumstances that you would like the Financial Assistance Committee to consider.

Note: 250-500 words are required. We encourage you to type and attach your essay, if possible. Incomplete applications will not be reviewed.

TELL US ABOUT YOURSELF

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

Gender Identity: _____

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

- Some High School
- High School Diploma
- Some College/Univeristy
- Associate's Degree
- College/ University Degree
- Master's or Professional Degree
- Doctoral Degree
- Other (Specify): _____

Employment Status: Employed Retired Disabled

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:

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:

“Who can apply for a scholarship?”

“Which programs are eligible for scholarships?”

“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 scholarship 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 scholarship 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: Financial Assistance Committee
PO Box 56033
Boston, MA 02205-6033

Please use this checklist to ensure that you are submitting all of the information required. Incomplete applications will not be reviewed.

- Verify your eligibility to receive a scholarship under the terms and conditions.
- Verify that your program selection is eligible under the terms and conditions (less than \$2,500 and takes place in the U.S. or Canada).
- Complete all of your contact information.
- Fill out the entire Financial Information section.
- Provide the name, number, required deposit, total cost and date of the program you have selected.
- Complete the 250-500-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 educational travel since 1975.