

# **Circles® Orange County**

## **Education Grant**

### **Purpose and Policies**

#### **Purpose:**

The Circles Education Grant serves to provide a source of financial assistance for Circle Leaders who would like to become further educated or certified to enhance their ability to perform at their current job or to qualify for a new job. This may include, but is not limited to, funding for tuition, supplies, materials, tools, certification fees, exam fees, etc. The Circles Education Grant is intended to facilitate efforts of the Circle Leaders to increase their employment or employability so that they can achieve self-sufficiency.

#### **Policies:**

The Education Grant is a one-time opportunity available when funds are sufficient. All current Circle Leaders have the opportunity to apply once within this time frame. If funds have not been fully utilized after the initially determined 4 month period, Circle Leaders will have the opportunity to apply for additional funds. The approval process is a minimum 14 day process, and the funds must be used to pay applicable education expenses. **This grant does not require repayment.** The maximum grant amount is \$250 per Circle Leader.

#### **Eligibility:**

1. To be eligible for an Education Grant, applicant must be an active Circle Leader and have attended at least 75% of the Weekly Meetings for the previous 3 consecutive months. Attendance at planned alternate Individual Circle meetings may be substituted for Tuesday Matched Circles night attendance. Absences which have been communicated to the Circles Coach and Matched Allies prior to the missed Weekly Meeting will be taken into consideration.
2. Qualified applicants must have completed the Circle Leader Training and be actively participating in a Matched Circle before being considered for the Circles Education Grant.
3. Applicants must have supplied all necessary information for all applicable Circles data collection efforts, including the initial report and each 6 months milestone, to the Circles Coach.
4. Applicants who have taken a "Leave of Absence" or chosen to "Exit" from Circles, or who have been absent from the program for more than 3 months, must seek and be granted readmission into the program and demonstrate compliance with all attendance and program policies for a consecutive 3 months period in order to be eligible to apply for the Education Grant.
5. Education expenses for income earners or potential income earners in the family will be considered. Education expenses for children are not covered by this grant.

## **Steps in Application Process:**

1. Circle Leader talks with the Circles Coach about intention to apply. The Circles Coach provides the Circle Leader with the Education Grant Application packet.
2. Circle Leader seeks any assistance available from Circles Staff or Allies to complete the application, which includes the documentation of applicable expenses. If tools, supplies, or materials will be purchased with grant funds, quotes from three (3) different sources must be submitted with the application.
3. Circle Leader submits the application to the Circles Staff to initiate the review and approval process.
4. Application must be approved and the amount determined by the Circles Coach and the Circles Coordinator. Approval may be provided electronically or by phone within approximately 14 days of the application submission.
5. Once approvals are obtained, the Circles Coordinator will request a check to be drawn according to St. Luke's financial policies. Checks will be issued in the name of vendors or education/testing/certification providers. Or, approved purchases may be ordered directly by the Circles Coordinator from St. Luke's approved vendors, when possible.
6. In the case of education classes, exams, and certifications, proof of completion will be required within 2 weeks after the expected completion date. An official purchase receipt must be submitted within 2 weeks of purchase in the case of supplies, materials, and tools purchased directly by the Circle Leader.

**Circles® Orange County**  
**Education Grant**  
Grant Application

I understand that because I am part of the St. Luke's Circles Initiative, I am eligible to apply for an Education Grant. This shows that the St. Luke's Circles Initiative is **committed** to me. I also understand that receiving a grant is a demonstration of **my commitment** to achieving self-sufficiency and being a contributing member of the Circles Initiative and the larger community.

I understand that the Circles Initiative determines grant requirements and agreements with each family on an individual basis. In exchange for a grant:

1. I will remain an active participant in the Circles Initiative, attending Weekly Meetings on a regular basis.
2. I will work with my Allies to identify steps to reach my education and employment goals.

**Circle Leader Information:**

Name \_\_\_\_\_ Date \_\_\_\_\_

Home Phone # \_\_\_\_\_ Cell Phone # \_\_\_\_\_ Other Phone # \_\_\_\_\_

E-mail \_\_\_\_\_

Place of Employment \_\_\_\_\_

Job Title \_\_\_\_\_ Date Hired \_\_\_\_\_

**Grant Information**

Provide the following information about your proposed usage of Education Grant dollars:

Amount of grant requested: \$ \_\_\_\_\_ (\$250 max)    Date Needed: \_\_\_\_\_

Brief description of classes, tools, materials, supplies, exams or certifications needed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will this help you increase your job capacity or income earning potential?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

When is your expected completion date of the class, exam or certification test? Or expected purchase date of tools, materials & supplies? \_\_\_\_\_

**Have you had a Circles Education Grant in the past?** Yes No

If yes, when and for what? \_\_\_\_\_  
\_\_\_\_\_

**Required Documents**

The following documents must be submitted along with this application:

- Documentation of Tuition, Fees and/or Tools, Materials & Supply Costs (3 quotes for purchases)*  
\*\*Please indicate on documentation to whom the check should be made\*\*  
If three quotes are not available, please explain why: \_\_\_\_\_  
\_\_\_\_\_

The following documents must be submitted upon completion and/or purchase of the education need:

- Receipts for tools, materials & supplies and/or*
- Documentation of completion of class, exam, or certification process.*

**Applicant Signature**

I, \_\_\_\_\_, agree to use the granted funds as described in the application above. I agree to provide all purchase receipts and documentation of completed classes, exams, and certifications within two weeks of purchase/completion to Circles Staff, and to allow information to be shared with my Allies and with the Guiding Coalition Leadership Team, as needed.

Circle Leader: \_\_\_\_\_ Date \_\_\_\_\_

**FOR OFFICE USE ONLY**

The following grant amount has been:  Approved Grant Amount \$ \_\_\_\_\_  
 Denied

Reason: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By signing below, you are verifying that you are aware of the Circle Leader's education goals, have discussed the Education Grant as a Matched Circle and are willing to support the Leader in successfully increasing job capacity.

Circle Ally: \_\_\_\_\_ Date \_\_\_\_\_

Circles Coach: \_\_\_\_\_ Date \_\_\_\_\_

Circles Coordinator: \_\_\_\_\_ Date \_\_\_\_\_