



ALABAMA  
**OPPORTUNITY**  
SCHOLARSHIP FUND

**2017 – 2018 Applicant Handbook**

A Guide to the Alabama Opportunity Scholarship Fund for Applicant Families

Alabama Opportunity Scholarship Fund  
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## Welcome to the Alabama Opportunity Scholarship Fund

The Alabama Opportunity Scholarship Fund (AOSF) believes that every child is unique, and that every child learns differently. Most students will thrive in their assigned neighborhood. However, there are some children who will need a different learning environment to reach his or her full potential. It's about giving children the tools to help them succeed. Sometimes that means another public school in a different neighborhood or sometimes that means attending private school. AOSF has a vision that one day, every Alabama child has an equal opportunity to a quality education, which can only occur when educators and local communities are empowered to create diverse learning options and all parents are empowered to match their children to the learning option that best meet their needs.

### Who is Eligible?

AOSF operates and awards scholarships under the authority of the Alabama Accountability Act. Students entering Kindergarten to grade twelve may be considered for scholarships, provided, however, that a rising kindergarten student be five years old by September 1, 2016 and that no student be over 18 years old at the time of application. In order to be considered for a scholarship, all applicants must be "income eligible." Income eligibility requires that the applicant's 2015 gross annual income not exceed a certain threshold based upon the household size. The 2016-2017 maximum allowed household income thresholds for *new applicants* are as follows:

Scholarship Income Guidelines 2016 Gross Income	
2017-2018 School Year	
Household size	Maximum Annual Income
2	\$29,637
3	\$37,296
4	\$44,955
5	\$52,614
6	\$60,273
7	\$67,951
8	\$75,647
For each additional member add \$7,696 per year.	

The Alabama Accountability Act gives priorities to certain categories of students. First, students are zoned to a "failing" public school, as designated annually by the Alabama State Department of Education are given priority. No scholarship award may be made to a new non-failing student until after July 31, 2017. Failing or non-failing public school assignment must be verified by the required Verification of Public School Assignment Form contained in this application. All applying students are subject to the failing school award priorities. In addition, the law requires that no more than one-quarter of new scholarships awarded annually go to students who were continuously enrolled in private education in the preceding academic year. All new students shall submit to AOSF a full-year report card for the 2016-2017 school year in order to determine whether the student shall be considered "private" for the purposes of the law. Please note that application procedures, including deadlines and certain priority considerations are subject to Alabama Accountability Act legislation and the guidance of the Alabama Department of Revenue. Procedures and policies operating under these authorities are subject to change.

## **The Application Process**

The Alabama Accountability Act defines a “family” as “a group of two or more people related by birth, marriage, or adoption, including foster care, who reside together.” Accordingly, a parent or guardian may apply for a student to whom the applicant is related by birth, marriage, adoption, or who is the legal guardian of an applicant student in foster care, so long as the applicant adult and student reside together. Each family is required to verify annual household income for the previous calendar year when applying for their student(s). In reviewing your application, AOSF will look at all the people who live in your household and all the income that is derived from the people who live in the household. Income sources include, but are not limited to: prior calendar year Alabama Income Tax filings (Alabama Form 40), W2s, Social Security Income/Disability for every household member (including children), Child Support, any other non-taxable/taxable income. Applicants must also submit a verification of their household composition, as well as a verification of their Alabama Public School Assignment. First-time applicants must also submit either a birth certificate (for rising Kindergarten students) or a full-year report card for the previous academic year. Completing this process is the responsibility of the parent/guardian, not the school.

Applications are considered on a first-come, first-served basis. An application cannot be considered for eligibility until both the application and all required supporting documentation have been received. Scholarship awards are dependent on standards contained in the Alabama Accountability Act as well as funding availability.

## **Application Consent/Certification**

The applying parent or guardian must certify that he or she has completed the scholarship application fully and accurately and that the true circumstances of the applicant's household size, household income and any other statements related to eligibility are reflected in the application. The misrepresentation of application information or the failure of an applicant parent or guardian to disclose information relevant to scholarship eligibility may result in the refusal or revocation of a scholarship award. AOSF reserves the right to verify any information submitted in the process of the application or required documentation process.

Applicant families who are awarded an AOSF scholarship will be subject to the program and reporting requirements of the Alabama Accountability Act. These requirements include the reporting of a student's scholarship award status to the Alabama Department of Revenue. In addition, students who are awarded a scholarship under the Alabama Accountability Act may be required to take a standardized, norm-referenced test, the results of which must be submitted by the scholarship student's Partner School to AOSF and the Alabama Department of Revenue.

## **Selecting a School**

During the online application process, each applicant will have an opportunity to select a prospective Partner School for each applying student. This process will be optional; If you do not wish to select a prospective Partner School during this time, you may select “Undecided.” If you do select a prospective Partner School, the selected School will receive notification of your application and may contact you.

Once a student has been officially awarded a 2016-2017 AOSF scholarship, you will receive a scholarship Award Notification via e-mail. The next step is to formally select a school. Scholarships are not awarded to schools. Scholarships are awarded to students. For a list of schools that accept the AOSF scholarship, please refer to the AOSF website at [www.alabamascholarshipfund.org](http://www.alabamascholarshipfund.org) under the Schools tab.

Once you choose a school, take your Award Notification to the school you've chosen and apply for admission into that school. Schools are not required to accept an awarded student, and each school maintains its own admission and enrollment procedures. Not all

participating non-public schools accept AOSF funds. Once your student has been admitted to the school, the school will use the child's award letter to generate a School Commitment Form (SCF) with AOSF to "activate" the scholarship award. Your Award Notification will contain an expiration date. Please confirm the school's completion of SCF to ensure that your scholarship does not expire. Scholarships that expire due to inactivity may not be reinstated.

### **What the Scholarship Covers**

AOSF scholarships are awarded on an academic year basis. AOSF scholarships cover tuition and certain mandatory fees for the time when the student is awarded a scholarship or enrolls in a participating school, whichever is later. If you choose to enroll a child before you have been awarded a scholarship and the school has completed an SCF form, you will be responsible for any financial obligations incurred and may not qualify for future scholarship funding. AOSF strongly encourages families not to enroll a student in a non-public school without an official scholarship award or a financial plan to pay, out of pocket or otherwise, for any financial obligations at the school.

Each partner school informs AOSF of the tuition and fees that are incurred by a student, by grade level. If you have questions about a particular school, please contact the school directly to inquire about the tuition and fee schedules and what will be covered by the scholarship. AOSF pays a maximum scholarship amount by grade level, per student, per academic year. The maximum award amounts are as follows:

- Entering grades K – 5           \$5,000
- Entering grades 6 – 8           \$6,500
- Entering grades 9 – 12         \$8,000

Any financial obligations at a school incurred beyond the maximum cap amount, or for fees or items not covered by the scholarship, are the responsibility of the parent or guardian. Partner Schools shall make available to applicant families a list of tuition and mandatory fees covered by the scholarship and discuss any financial obligations outside of the scholarship or on the website of the Partner School. Partner Schools may not charge a different rate for scholarship students. Likewise, AOSF cannot pay for any fees that are not included on the published fee schedule.

Many schools charge more than the maximum scholarship amount. In some cases, schools may decide to provide Alabama Opportunity Scholarship Fund scholarship students with supplemental financial aid at their own discretion. But in many other cases, parents will be required to pay the difference between the scholarship and the full tuition and fees. Those payments are not discretionary. Every family must pay the difference between the school's total tuition, our scholarship and any financial aid or supplemental scholarships the school may provide. There are no exceptions to this rule, and a student may lose the Alabama Opportunity Scholarship for failure to comply.

### **Adjusting to a New School Environment**

Entering into a new educational environment can be challenging for both a student and a parent or guardian. AOSF hopes for the transition to be as smooth as possible. We have found that some students need help in making the adjustment to a new school environment. The courses may be more advanced and difficult and there may be more homework. The school may have different rules or standards and stricter enforcement thereof. We urge parents to remain in constant contact with the school, its counselors and teachers, and to seek tutoring or mentoring services that might be available.

## **Scholarship Payment Distribution**

Scholarship checks are written to the school the student is attending, and are sent directly to the school. No payments will be made to the parent or guardian of the scholarship recipient. The parent or guardian who is listed on the scholarship application must personally co-endorse the check after the school receives it. The school will contact you to notify you when to go to the school to endorse the check. This will happen a four times during the school year. The applicant parent or guardian must endorse the scholarship check, even if that student is no longer attending the school or has withdrawn from the scholarship program. The failure of the designated parent to co-endorse the check within ten business days after being notified by the school or within the time specified by school policy could also result in the loss of your scholarship and could also affect scholarship eligibility in future years.

## **Student Behavior and Scholarship Obligations**

Scholarship students must follow all academic and conduct policies of the school that they attend on scholarship. Schools maintain the right to enact discipline, including expulsion or suspension, against students who fail to comply with the partner school's policies and procedures. AOSF recommends that you carefully review those policies and procedures to ensure that your children remain eligible for the scholarship. The Alabama Opportunity Scholarship Fund does not govern school policies regarding the retention of students due to academic or discipline issues.

A student who is expelled from a partner school while on scholarship may seek to enroll in another partner school. However, expulsion from or failure to gain admittance into another partner school may affect the may cause a student to lose their scholarship or be ineligible for scholarship application in future academic years.

## **Leaving a School**

Scholarship students are also expected to maintain regular school attendance. During the course of the school year, circumstances may change such that a parent or guardian may decide to withdraw the student from a Partner School. If you plan to withdraw your student during the school year, please notify both AOSF and the partner school as soon as possible. If you transfer to another Partner School you may be able to use your scholarship at the new school, if funds remain available. The tuition and fees at the original partner school will be prorated based on the actual days of attendance.

## **Moving Your Student to Another Eligible Partner School**

One of the benefits of this scholarship program is that if you are not satisfied with a school, or if you move within the state of Alabama, you may go to another school. You may transfer your scholarship student to another eligible Partner School at the completion of the first, second, and third scholarship quarters as long as you have no outstanding financial accounts at the previous school, including unsigned scholarship checks, and provided that the student has remaining AOSF scholarship funds.

In order to ensure the portability of scholarships for funded students, AOSF has an Inter-Partner School Transfer Policy. This policy provides that transfers by an AOSF scholarship recipient student from one Partner School to another Partner School will be permitted at the end of a scholarship quarter only. For the 2017-2018 school year, Inter-Partner School Transfers will be permitted *on October 13, 2017, December 15, 2017, and March 2, 2018*. Additionally, *no*

*Partner School to Partner School transfers will be permitted after the third scholarship quarter, ending March 2, 2018.* If you choose to transfer a scholarship student during any time outside of the permitted transfer periods, your child's attendance at a Partner School may not be covered by your AOSF scholarship.

If you plan to withdraw your student during the school year, please notify AOSF and your current school as soon as possible. The school your student is leaving must then complete a form that confirms the student is planning to leave, and submit that form to the scholarship office within five business days of being notified that the student is leaving. A scholarship cannot be activated at another Partner School until the student has officially withdrawn from the original Partner School *and* the original Partner School confirms the withdrawal and that that the household has no outstanding balance owed. A student's maximum scholarship award is for an academic year, not per school, so multiple transfers during the school year may cause scholarship dollars to be expended before the end of the school year.

After confirmation of official withdrawal, the new Partner School you choose must fill out a School Commitment Form (SCF) for your student. AOSF will confirm the receipt of all necessary documents and complete the transfer process. This process may include a final payment to the school that is being exited, which must be signed by the appropriate individual following the check cashing policy, or a request for refund of over-payment for the student transferring.

### **Withdrawing From the Scholarship Program or Declining a Scholarship**

After being awarded a scholarship, a parent or guardian may elect to decline a scholarship. A scholarship may be declined either before or after enrolling and attending a partner school, resulting in the applicant's voluntary withdrawal from the scholarship program. Should you choose to withdraw from the scholarship program at any time during the academic year, please contact AOSF and the partner school, if applicable, as soon as possible. Please be aware that withdrawal from the scholarship program at any time does not disqualify the student from future application, but the student may be considered "new" for the purposes of scholarship eligibility for future years.

### **Updates**

It is very important that AOSF can reach a parent or guardian at all times. Your application log-in information will contain information about updates or additional needs for your scholarship process. Please be sure to frequently check your email and online application for updates. If AOSF is unable to reach you about documentations or eligibility questions during the application process, your application will be placed on hold and processing will be suspended. Additionally, if you are awarded a scholarship, award notifications will be sent to the contact information on file. AOSF cannot be responsible for the expiration of scholarships due to insufficient applicant contact information.

When you submit your application, you must provide a physical address, valid email address and at least one phone number. AOSF may attempt to contact you during the course of the application and award process. If any of your contact information changes during the course of the academic year, please update AOSF.

*Effective 02/28/2017*