

Individual Education Assistance Application Packet

The Total Catholic Education Endowment Fund

**Catholic Community Foundation, Inc.**

*Administered by the*

**Secretariats for Catholic Schools, Worship and Evangelization, Pastoral Ministries**

**Purpose of the Total Catholic Education Endowment Fund (TCE Fund)**

The purpose of the TCE Fund is to provide financial resources to support the professional training, education, and staff development of Catholic educators, catechetical leaders, and pastoral ministers employed by the Archdiocese of Indianapolis in order to enhance education and faith formation in the Church of central and southern Indiana.

All requests for funding must be related to the formal education and faith formation ministries of the Archdiocese of Indianapolis under the direct purview of the three secretariats: Secretariat for Worship and Evangelization, Secretariat for Catholic Schools, and the Secretariat for Pastoral Ministries. The term faith formation is understood broadly to include not only catechesis but also various pastoral ministries of the archdiocese. All programs and activities funded shall be in accordance with the policies and teachings of the Roman Catholic Church and the Archdiocese of Indianapolis.

**Individual Education Assistance:** This is tuition-only assistance to fund individual education and faith formation for employeesof the archdiocese for professional education and training to enhance leadership or teaching skills, or to obtain degrees or certification desired or required for specific roles or positions within the formal education and faith formation ministry of the archdiocese. It is envisioned that the employee will faithfully serve the Archdiocese of Indianapolis for a full five (5) program years following completion of the funded educational program. If the program cannot be completed within a reasonable time, the applicant is expected to communicate the alternate plan to the TCE Grants and Assistance Committee. This assistance intends to qualify as a non-taxable employee benefit up to the allowable limitation under IRC 127, which is $5,250.00. Any assistance disbursed in excess of this amount annually will be taxable compensation to the individual recipient.

**Funding Process**

Funding is awarded on a twice-yearly basis from the interest earned from the TCE Endowment. The number of tuition assistance awards and the overall level of funding available in each cycle are highly dependent on market effects upon the earning power of the TCE Endowment as well as the total amount of funding requested for the cycle.

Applications are received and processed by the Business Manager in the Office of Catholic Schools. Applications determined to be complete are submitted to the TCE Grants and Assistance Committee for evaluation. Applications received after the specified deadline may be considered if sufficient funding is available. The TCE Grants and Assistance Committee makes recommendations for funding of requests to the leaders of the three secretariats. The three secretariat leaders then determine the final awards. The decisions of the secretariat leaders for funding are final.

**Funding Cycles**

The twice-yearly application deadlines are as follows:

**October 1** for spring semester classes beginning after **December 31**

**March 1** for summer and fall semester classes beginning after **May 31**

***Note: Applications must be e-mailed to Maureen Okerson at*** [***mokerson@archindy.org***](mailto:mokerson@archindy.org) ***no later than the application deadline.***

**Criteria for Awarding Individual Education Assistance**

1. The skills and education obtained by the recipient are relevant to the education and faith formation ministries of the archdiocese.
2. Renewal applications receive priority for awards.
3. Recommendations from the applicant’s supervisor, pastor, principal, president, or agency director. Two recommendation letters are required.
4. The applicant must provide reasonable evidence of potential for academic success. All previous bachelor’s degree transcripts are required.
5. Applicant’s employment history. A resume′ is required.
6. Documented support of appropriate archdiocesan agency or office director if applicable.
7. Consideration of equitable distribution of education assistance across all ministries of the Archdiocese.

***NOTE: Incomplete applications will not be forwarded to the TCE Grants and Assistance Committee****.*

**Qualifications for Individual Education Assistance**

Individuals employed by the Archdiocese of Indianapolis in the formal educational programs of the Archdiocese as Catholic school teachers and education and faith formation administrators are eligible to apply for Individual Education Assistance from the TCE Fund in accordance with the above criteria. Successful proposals will augment the applicant’s professional education, skills and certification as well as enhance the leadership of the education and faith formation mission in institutions of the Archdiocese of Indianapolis (program contribution).

TCE Individual Education Assistance is generally awarded for relatively short-term professional training such as for licensure or license renewal to teach a certain subject or grade level, Master’s Degrees that lead to a higher skill level in catechesis or teaching; or additional training that leads to qualification as a supervisor, administrator, youth minister, etc. Special consideration may be given to those seeking qualification/licensure in areas where there is a shortage of qualified teachers or administrators (i.e., math and science teachers, professional DREs, principals, etc.). Requests for full funding of 4-year Bachelor’s Degrees or Doctorates generally fall outside the scope of the Individual Education Assistance program, as these are long-term commitments and tend to cause an ongoing demand for funds that may preclude awards to several other short-term applicants that could be served with equivalent funds. Bachelor’s Degrees are usually considered the minimum qualification for entering the fields of education, faith formation and youth ministry and Doctorates are often seen as beyond the scope of necessity for most ministries covered by the program. However, all applications for funding will be considered on the merits of the request.

Individual Education Assistance will be awarded with the following stipulations:

* **Individual Education Assistance is for tuition only.** Costs for books, student fees, transportation and all other related and incidental costs are to be paid by the applicant (in-kind contribution).
* **Individual Education Assistance is intended to qualify as a non-taxable employee benefit up to the allowable limitation under IRC 127, which is $5,250.00. Any assistance disbursed in excess of this amount annually will be taxable compensation to the individual recipient. Recipients should consult a tax advisor.**
* Applicants for funding of administrative or theological degrees or training must be professed and practicing Catholics.
* Applicants for funding of degrees or training leading to qualification or certification for administrative positions in Catholic schools or faith formation programs must complete the appropriate online SRI Interview which will be reviewed by a trained perceiver from the Office of Catholic Schools and receive a satisfactory score **before** funding can be awarded.
* TCE funds are granted to pay for the tuition on the following schedule – March 1st application deadline for summer and fall semesters, and October 1st application deadline for the spring semester. A tuition invoice/statement and a completed disbursement request form must be presented for payments to be made.
* A new education assistance acceptance form must be signed each time funds are awarded to the applicant.
* Renewal requests for the next application cycle, while not guaranteed, is accomplished with a simplified application process and renewal assistance is awarded on a first-priority basis.
* Proof of prior course completion and success are required for education assistance renewal and at the completion of the proposed program of study.
* At the discretion of the employer, it is envisioned that the employee will faithfully serve the Archdiocese of Indianapolis for an additional 5 full program years after completing their proposed education.
* All decisions concerning reasonable progress and program completion shall be made by the leaders of the three secretariats.

For further information please contact:

Maureen Okerson, Business Manager

Office of Catholic Schools

1400 N. Meridian Street

Indianapolis, IN 46202

(317) 236-1440 or

Toll Free (800)382-9836 Ext. 1440

E-mail: mokerson@archindy.org

Website: www.archindy.org



OCS Revised 08/2018 MO

Total Catholic Education Endowment Fund

Individual Education Assistance

**Application (New)**

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| Application Date: |  | | Social Security  Number: | | | XXX-XX-\_\_\_\_\_\_\_ (last 4) | | | | | |
| Name of Parish/ Institution (Employer): |  | | | City: | | | | | | | |
| Name of Applicant (Employee): |  | | | | | | | | | | |
| Applicant Home Address Information: | Phone: Daytime: | | | | | | | |  | | |
|  | Evening: | | | | | | | |  | | |
| Street: |  | | | | Home E-mail: | | | |  | | |
|  |  | | | | Work  E-Mail: | | | |  | | |
| City: |  | | | | State: | | |  | | ZIP: |  |
| Please state Educational Goal of Assistance Request (describe the degree, license, certificate, skills, etc.) and desired Institution: | | | | | | | | | | | |
| Total Cost of Education  Request (from budget): | $ | Installment amount requested this time | | | | | $ | | | | |
| Timeline: Proposed Beginning Date of program: | m/d/yy | Expected ending  Date of program: | | | | | m/d/yy | | | | |
| Will this installment complete your proposed education or training program:  YES  NO | | | | | | | | | | | |
| NOTE: All of the above information must be provided | | | | | | | | | | | |

Please answer all questions completely on the attached worksheet and budget form:

Please submit with this application:

a work resume

all college transcripts

any other information showing the extent of your previous educational/professional background, experience and service

copies of official institutional documents showing current per-hour tuition costs for which you are requesting TCE grant funds

two (2) recommendation letters: 1) a recommendation from your principal or supervisor; 2) a letter of support from your education commission/board president, pastor, dean, high school president, or program director.

Administrative applicants must make arrangements with OCS to complete the online SRI survey and be recommended as an administrative candidate before assistance can be approved.

NOTE: Incomplete applications will not be submitted to the TCE Grants and Assistance Committee.

**I hereby certify that I understand and agree to the Archdiocese of Indianapolis Total Catholic Education Endowment Fund’s (TCE Fund) requirements for individual education assistance.**

* **If assistance is awarded, I the recipient, at the discretion of my employer, will faithfully serve the Archdiocese of Indianapolis for five (5) years after completion of my educational program.**
* **If assistance is awarded, I the recipient, understand the assistance disbursed over the amount of $5,250.00 annually will be considered taxable compensation.**

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**Signature of Assistance Applicant** **Signature of Pastor/President**

#### SUBMIT TO: [mokerson@archindy.org](mailto:mokerson@archindy.org) (Revised 08/18 MO)

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| TCE INDIVIDUAL EDUCATION ASSISTANCE APPLICATION Page 2 | Applicant Name: |
| 1. Please provide a brief description of the proposed course-of-study/training including the educational goal(s) of the assistance request. | |
| 1. Description: | |
| 1. Educational goal(s) of the assistance request (degree, license, certificate, etc.): | |
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| 1. What impact is the achievement of the educational goal likely to have on enhancing the quality of your ministry at the parish, school, or agency you serve? | |
| 1. What impact is the achievement of the educational goal likely to have on enhancing the quantity of ministry delivered (i.e., how many people will the applicant potentially reach and in what settings over a five-year period following the completion of the program of study)? | |
| 1. What is the relevance of this proposal to the mission of your school/parish, or the archdiocese (degree of direct application to needs)? | |
| *Continue to next page please* | |

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| TCE INDIVIDUAL EDUCATION ASSISTANCE APPLICATION Page 3 | Applicant Name: |
| 1. Financial Questions: | |
| 1. Are you, the applicant, willing to make significant direct or in-kind contributions to the cost of this proposed education/training (i.e., time, effort, cost of textbooks, materials, fees, transportation, childcare, etc.)? (describe and show detail in the budget): | |
| 1. What is the relative economic need of the school, parish, or agency you work for? | |
| 1. What is the relative economic need of you, the applicant? | |
| 1. What will be the consequences to your ministry if the assistance request is not funded? | |
| *Continue to next page please* | |

Please thoroughly recheck all information and figures before submitting

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| TCE INDIVIDUAL EDUCATION ASSISTANCE APPLICATION  Page 4 | | | |
| 16. **Budget Form (New Assistance)** (Submit with New Education Assistance Application) | | | |
| Application Date: |  |  |  |
| Name of Parish/ Institution (Employer): |  | City: |  |
| Name of Applicant (Employee): |  | | |
| College or Training  Institution to be attended: |  | | |

***Please list the tuition-only costs of the entire proposed educational or training program and then check-off the courses that you wish to take during the next funding cycle:***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **✓** | **Course**  **Number** | **Title of Course** | **Semester and Year** | **Credit**  **Hours** | **Tuition per**  **Course** |
| **✓** | *Example: EDU 00* | *Introduction to Education* | *Winter 2004* | *3* | *$ 900.00* |
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| **Total tuition assistance amount requested**  **to complete proposed program at current prices:** | | | | |  |
| **Tuition installment amount requested this application:**  **(Have you checked off the courses requested for this funding cycle above?)** | | | | |  |

***Please list fees/books/transportation/supplies, etc. needed (Applicant’s contribution):***

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| **Applicant’s total contribution:** |  |

NOTE: March 1 applications are for programs or classes beginning after May 31 and October 1 applications are for programs or classes beginning after Dec. 31.