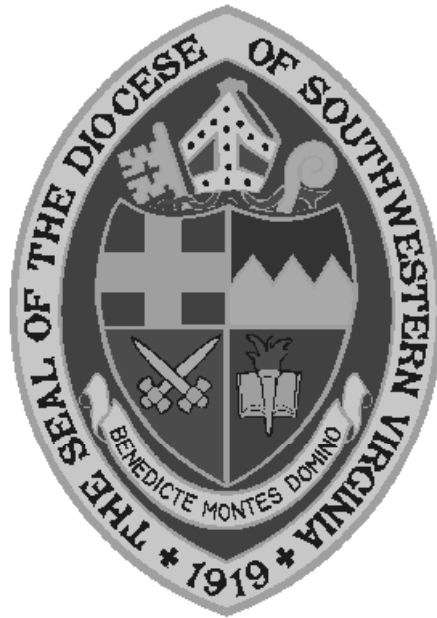


**The Episcopal Diocese of  
Southwestern Virginia  
P. O. Box 2279  
Roanoke, VA 24009-2279  
1-800-DIO-SWVA  
www.dioswva.org  
[aboyce@dioswva.org](mailto:aboyce@dioswva.org)**



**Beirne Carter Grant  
Application Booklet  
revised June 2006**

**TO:** Canonically Resident Clergy  
**FROM:** Alan N. Boyce  
**SUBJECT:** Beirne Carter Grant Application

Dear Friends,

This booklet contains the application for the Beirne Carter Education Grant. Please note that there will be a total of approximately \$13,000 to be awarded this year. Also, note that the Free Application for Federal Student Aid (FAFSA) is required for all requests for undergraduate grants. The FAFSA is available online at <http://www.fafsa.ed.gov/>.

The deadline for receipt of your application(s) is March 31. I anticipate the committee will meet around April 15. You will hear from me by April 30 as to the outcome.

Please don't hesitate to contact me at 1-800-346-7982 or [aboyce@dioswva.org](mailto:aboyce@dioswva.org) should you have questions on this or any other matter.

Sincerely yours,



Alan N. Boyce  
Deputy for Administration

ANB/kg

cc: Beirne Carter Education Grants Committee

*Revised June 2006*

## BEIRNE CARTER EDUCATION GRANT

Beirne Carter left 4000 shares of Caterpillar stock to the Trustees of the Funds for the purpose of educating clergy children. It is estimated that this fund would generate approximately \$8,000 - \$10,000 per year.

It is our intention to award the annual income from this bequest in the form of grants for the education of clergy children. The corpus will remain intact. The growth of the fund will insure the availability of perpetual income to be utilized for the purposes of awarding these grants on an annual and continuing basis.

Please note that because the annual earned income is limited, grant requests may exceed availability of funds. As such, grants will be awarded based upon priority categories as well as need. Therefore, a committee will make the determination on an annual basis as to grants that will be awarded. It is the intention to award all income annually in the form of education grants. Any unawarded income will be accumulated in the "Beirne Carter Education Grant" distribution fund at year end.

It should also be noted that these guidelines are flexible to the extent that experience may sometimes warrant the changing of these guidelines as we see the level of funds available and the number of applications for these funds. Again, it is the intention to use this money for the purposes described; therefore we wish to distribute all the income.

*After three years of experience, the Beirne Carter Education Grant committee established evaluative criteria for its use. As such, effective January 1, 1994, all grant applications must be accompanied by a copy of the Free Application for Federal Student Aid (FAFSA), available online at <http://www.fafsa.ed.gov/>. This form will greatly assist the Beirne Carter Education Grant committee in making difficult funding decisions.*

### ELIGIBILITY

- Grants will be made only for the benefit of clergy children.
- Clergy, whether active or retired, must be canonically resident in the Diocese of Southwestern Virginia. Also eligible to apply are surviving spouses of clergy as well as spouses divorced from clergy.
- There must be a stated monetary need in order to be eligible for a grant from this fund. Quite simply, the committee will not award a grant unless there is an out-of-pocket need to be filled. This requirement is not to be confused with whether or not you can pay for this need. Being clergy canonically resident in this diocese does not qualify you for a grant for a child unless there is a need to be filled.

### AMOUNT

- Grants awards will generally not exceed \$1,500 per year per child. The committee may grant more funds if it deems additional funding appropriate. There is no preclusion for the awarding of more than one grant per family, if qualified, depending upon funds availability.

### TERM

- Grants will be awarded on an annual basis. Grant requests will be considered on the merits of need and funds availability for the current year. There will be no long-term commitments made beyond a one-year funding cycle. Clergy may apply and receive grant awards in subsequent years. However, there will be no commitments made to fund a grant request beyond one year.

## PRIORITIES

- Grants will be considered by a grant committee utilizing the following priorities in determining grant requests:

Priority 1 - Undergraduate Education (B.S. and B. A. degrees)

Priority 1 - Special Education Needs of younger children

Priority 2 - Supplemental Education Experience for short-term, *non-academic sessions/events*

Priority 3 - Private Schools, Preparatory Schools, etc.

## GRANTS WILL NOT BE AWARDED FOR GRADUATE STUDY

All grants will be reviewed in these priorities until the available income is used. That is, all grant requests will be filled for priority 1 first; then priority 2 will be looked at if there are sufficient funds to do so. Priority 3 will be last to be reviewed as long as there are sufficient funds to do so.

## APPLICATION PROCESS

- Grants will be considered only if an application has been made.
- Applications must be accompanied by a copy of the FAFSA, available online at <http://www.fafsa.ed.gov/>.
- An application must be completed for each child for each academic year a grant is being requested.
- Applications will be available in Evans House for any member of the clergy meeting the eligibility requirements.
- Applications will be due in Evans House no later than March 31 of each year. Grant applications should be sent to the attention of the Deputy for Administration.
- Applications will be considered by a grants committee that will meet in April of each year.

## GRANT AWARDS

- Grants will be awarded annually during the first working week of May. Letters of denial of grant awards will also be sent during this week. Letters of denial will state the reason(s) the grant request was declined.
- Grants will be awarded for the amount of the need stated on the application, generally not to exceed \$1,500. When the requested amount is less than \$1,500, then the amount of the actual request will be awarded. For example, if the need is for special education for a particular problem, and if the estimated expense for tutoring, etc. would be \$750, then \$750 would be awarded, not \$1,500.
- Grant checks will be made payable to the clergy parent or the surviving or former spouse. Grant checks may also be made payable to the college / university if the parent so desires.

### GRANT COMMITTEE

- The committee will have seven members.
- The Bishop is an ongoing, ex-officio member of the committee with voice and vote.
- The other six members are to be appointed by the Executive Board. It is not required that committee members be Executive Board members.
- The initial committee will establish three-, two-, and one-year terms in order to begin classes. Each future appointee will serve on this committee for a three-year term.
- The six members shall be three clergy and three lay.
- Consideration for appointments should be made in terms of geographic representation and skills in the area of education and grants structures.
- The grants committee will meet in April of each year in order to review and consider grant applications as well as the guidelines for the Beirne Carter Bequest.

### CONTINGENCIES

Grants will not be considered unless made within the guidelines and process established. Every effort will be made to keep this process within the guidelines as described above. It is the responsibility of the diocese to communicate these guidelines and provide applications to clergy on a timely basis. It is the responsibility of the clergy to make application within the prescribed guidelines. However, it is realized and anticipated that unanticipated and unplanned needs could arise outside of the grant schedule. Therefore, there will be established a reserve fund of 20% of the annual income from the Beirne Carter bequest for the purpose of handling unanticipated needs. An application must be submitted to the Deputy for Administration who in turn will route it to the grants committee for approval or rejection. If the request meets contingency needs and is approved, the grant will be awarded immediately from the reserve fund.

**DIOCESE OF SOUTHWESTERN VIRGINIA  
BEIRNE CARTER EDUCATION GRANT  
APPLICATION FORM**

This form is to be completed by a parent of the child for whom a grant is being requested. Please complete one application for each child.

**ELIGIBILITY**

1) Are you canonically resident in this diocese: \_\_\_ YES \_\_\_ NO.

(In order to qualify for this grant, you must be canonically resident in the Diocese of Southwestern Virginia.)

2) Do you have a specific monetary need to be filled for the education of this child? \_\_\_ YES \_\_\_ NO.

(In order to qualify for this grant, you must have a specific monetary need to be filled, not to be confused with whether you may or may not be able to fill this need yourself. Are you facing personal out-of-pocket expenses for the education of this child for the purpose as stated in this application?)

***SEE FINANCIAL INFORMATION SECTION OF THIS APPLICATION***

**PARENT INFORMATION**

NAME \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE : WORK: (\_\_\_\_) \_\_\_\_\_ HOME: (\_\_\_\_) \_\_\_\_\_

FAX: (\_\_\_\_) \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME OF PARISH?TOWN \_\_\_\_\_ :

**CHILD / STUDENT INFORMATION**

NAME : \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE : WORK-(\_\_\_\_) \_\_\_\_\_ HOME-(\_\_\_\_) \_\_\_\_\_

FAX: (\_\_\_\_) \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME OF SCHOOL: \_\_\_\_\_

AGE OF CHILD : \_\_\_\_\_

## BACKGROUND INFORMATION

(In the spaces provided, please provide the committee with some information pertaining to this application. You may use a separate sheet if you need additional space.)

WHAT IS THE CHILD'S MAJOR (OR WHAT IS THE CHILD'S CURRENT EDUCATIONAL GOAL)?

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IF THIS APPLICATION IS TO FULFILL A SPECIAL EDUCATION NEED, PLEASE DESCRIBE.

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HOW WILL THIS GRANT BENEFIT YOUR CHILD?

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FOR WHAT PURPOSE IS THIS GRANT TO BE USED?

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HAVE YOU EVER APPLIED FOR A GRANT FROM THIS FUND IN THE PAST?

\_\_\_ YES \_\_\_ NO

IF YES, WAS A GRANT AWARDED: \_\_\_ YES \_\_\_ NO

IF YES, PLEASE COMPLETE THE FOLLOWING:

<u>YEAR</u>	<u>NAME OF CHILD</u>	<u>AMOUNT OF GRANT RECEIVED</u>
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_____	_____	\$ _____
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_____	_____	\$ _____
-------	-------	----------

_____	_____	\$ _____
-------	-------	----------

_____	_____	\$ _____
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FINANCIAL INFORMATION (TO DETERMINE YOUR OUT-OF-POCKET EXPENSE RELATED TO THE EDUCATION OF THIS CHILD FOR THE PURPOSE AS STATED ON THIS APPLICATION)

(A) \$ \_\_\_\_\_ TOTAL COST OF EDUCATION THIS YEAR / THIS PURPOSE.

(B) \$ \_\_\_\_\_ TOTAL ANTICIPATED RECEIPTS FROM OTHER GRANTS AND / OR SCHOLARSHIPS. (INCLUDE MONIES RECEIVED AND APPLIED FOR.)

(C) \$ \_\_\_\_\_ TOTAL AMOUNT TO BE PAID BY ANY SOURCE OTHER THAN YOU ( SUCH AS PARISH, FRIENDS, PARENTS, GRANDPARENTS, ETC.)

(D) \$ \_\_\_\_\_ YOUR NEEDS FOR THIS YEAR. (A-B-C = D)

(E) \$ \_\_\_\_\_ AMOUNT THAT YOU ARE REQUESTING

**NOTE: THE AMOUNT OF THE GRANT, IF APPROVED, WILL BE FOR LINE D, NOT TO EXCEED \$1,500 PER YEAR, UNLESS AN EXCEPTION IS APPROVED BY THE COMMITTEE. IF LINE D IS ZERO, THEN NO GRANT WILL BE CONSIDERED.**

**CERTIFICATION**

**I/WE CERTIFY THAT THE FUNDS DISTRIBUTED FROM THE BEIRNE CARTER EDUCATION GRANT WILL BE USED FOR THE STATED PURPOSE AS EXPRESSED IN THIS APPLICATION. I/WE FURTHER CERTIFY THAT IF THIS GRANT IS AWARDED AND CONDITIONS CHANGE TO THE EXTENT THAT THE CHILD DOES NOT PURSUE THIS OR ANY OTHER EDUCATIONAL ENDEAVOR, THE FUNDS RECEIVED WILL BE PROMPTLY RETURNED TO THE DIOCESE FOR THE USE OF OTHER CLERGY CHILDREN PURSUING THEIR EDUCATION.**

**SIGNATURE \_\_\_\_\_ OF  
PARENT: \_\_\_\_\_ DATE: \_\_\_\_\_**

**SIGNATURE \_\_\_\_\_ OF  
PARENT: \_\_\_\_\_ DATE: \_\_\_\_\_**

*Effective January 1, 1994, all grant applications must be accompanied by a copy of the FAFSA, available online at <http://www.fafsa.ed.gov/>. This form will greatly assist the Beirne Carter Education Grant committee in making difficult funding decisions.*

**GRANT COMMITTEE USE ONLY**

**DATE REVIEWED: \_\_\_\_\_**

**PRIORITY: 1 2 3**

**COMMENTS:**

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**COPY OF FAFSA RECEIVED: \_\_\_\_\_**

**DECISION:            APPROVED \_\_\_\_\_            DECLINED \_\_\_\_\_**

**DATE PAYMENT ISSUED: \_\_\_\_\_ CHECK NO. \_\_\_\_\_**

**PAYABLE  
TO: \_\_\_\_\_**