

# ROAD SCHOLAR®

## CAREGIVER GRANTS

Dear Applicant,

Thank you for your interest in Road Scholar Financial Assistance. Because of the generosity of our donors, we are able to offer assistance to hundreds of lifelong learners each year in experiencing the joy of discovery, connection and adventure. Since our earliest days, we've been committed to ensuring that adults 50 and older with limited financial means can take part in our programs — and we're proud that nearly 100% of eligible applicants receive financial assistance.

Road Scholar is often described as a “university of the world.” Our educational adventures bring people together from many backgrounds and life experiences, creating vibrant learning communities enriched by every participant's perspective. Financial Assistance helps make that possible.

If you're considering applying, we warmly encourage you to do so. In your application, you'll have the opportunity to share your story — what draws you to a particular program and what circumstances make financial assistance meaningful for you. We understand that every situation is unique, and we value the chance to learn more about you.

It is our hope that Road Scholar Financial Assistance can turn your interest in a Road Scholar program into a reality. We would be honored to welcome you on a learning adventure and to have you as part of our community.

With warm regards,



James Moses  
President  
Road Scholar



## THE BASICS: WHAT YOU NEED TO KNOW ABOUT CAREGIVER GRANTS

### Who is eligible for a Caregiver Grant?

Please review the eligibility criteria before you start the application process.

- You are the primary unpaid caregiver providing daily care and support for an ill or disabled family member (spouse, parent, adult child, partner or sibling).
- You are 50 years of age or older.
- You live in the United States.
- Facing financial barriers that prevent participation in a Road Scholar program. Generally, Caregiver Grants are awarded to recipients whose household income is less than 80% of the median income in their state of residency.
- You have not taken a Road Scholar program in the last two years.
- Your loved one may also be receiving home care, hospice, visiting nurse, LPN services, or comparable and related services.
- Your loved one may be in adult day care, memory care, a nursing home or comparable or related facility.

You are also eligible if you have lost a loved one for whom you were the primary caregiver within the past two years.

### Which programs are eligible for Caregiver Grants?

You can apply for a Caregiver Grant 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.
- The application must include the program number and date of a specific program that costs \$2,500 or less.

### What happens if my application is approved?

If you're awarded a Caregiver Grant, 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. Here's how the Grant works:

- The Caregiver Grant is applied toward the cost of the program you selected in your application.
- The amount of the Caregiver Grant 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 Caregiver Grant has been applied.

### What happens if I 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 my plans change?

We know that in rare instances a grant recipient may have to adjust their travel plans. Here are some things to keep in mind:

- If you cancel your enrollment in the program, the Caregiver Grant becomes void.
- If Road Scholar cancels your program, the Caregiver Grant can be transferred to another program without fees.
- If after enrollment you decide to transfer to another eligible program, the Caregiver Grant may be transferred along with the enrollment. The corresponding transfer fees will apply.
- Your Caregiver Grant can't be transferred to another person.

### Is there anything the Caregiver Grant doesn't cover?

The Caregiver Grant 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 am I expected to do when I return from my program?

When you get back from your adventure, we ask that you do a few things for us.

- Complete an evaluation of the program.
- Write a thank-you letter to the donor(s) who funded your Caregiver Grant.
- 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 Caregiver Grants.

---

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

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

## HOUSEHOLD INCOME GUIDELINES BY STATE

Household income guidelines by state to help applicants understand typical scholarship eligibility ranges. Applicants with household incomes below approximately 80% of their state's median income are generally prioritized, although individual circumstances may also be considered.

State	1 Earner	2 People
Alabama	\$43,560	\$49,770
Alaska	\$57,645	\$65,880
Arizona	\$50,985	\$58,275
Arkansas	\$40,410	\$46,170
California	\$59,535	\$68,004
Colorado	\$71,820	\$62,820
Connecticut	\$62,820	\$71,820
Delaware	\$54,855	\$62,685
District of Columbia	\$65,655	\$75,060
Florida	\$48,060	\$54,900
Georgia	\$49,590	\$56,700
Hawaii	\$62,010	\$70,875
Idaho	\$49,590	\$56,700
Illinois	\$55,530	\$63,450
Indiana	\$47,835	\$54,675
Iowa	\$50,310	\$57,510
Kansas	\$49,320	\$56,340
Kentucky	\$42,435	\$48,510
Louisiana	\$41,400	\$47,340
Maine	\$49,860	\$56,970
Maryland	\$65,655	\$75,060
Massachusetts	\$65,655	\$75,060
Michigan	\$48,195	\$55,080
Minnesota	\$58,905	\$67,320
Mississippi	\$39,420	\$55,305
Missouri	\$48,420	\$55,305

State	1 Earner	2 People
Montana	\$48,240	\$55,125
Nebraska	\$52,515	\$60,030
Nevada	\$49,140	\$56,160
New Hampshire	\$63,450	\$72,540
New Jersey	\$65,655	\$75,060
New Mexico	\$40,995	\$46,800
New York	\$55,575	\$63,495
North Carolina	\$47,880	\$54,720
North Dakota	\$56,565	\$64,620
Ohio	\$48,600	\$55,530
Oklahoma	\$43,785	\$50,040
Oregon	\$53,370	\$60,975
Pennsylvania	\$51,435	\$58,770
Rhode Island	\$59,985	\$68,580
South Carolina	\$45,630	\$52,155
South Dakota	\$51,525	\$58,860
Tennessee	\$46,530	\$53,190
Texas	\$49,815	\$56,925
Utah	\$58,545	\$66,915
Vermont	\$56,295	\$64,350
Virginia	\$59,895	\$68,445
Washington	\$61,560	\$70,380
West Virginia	\$40,005	\$45,720
Wisconsin	\$52,830	\$60,390
Wyoming	\$50,085	\$57,240

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

## CAREGIVER GRANT APPLICATION INSTRUCTIONS

Please read these instructions carefully before applying for a Caregiver Grant.

Please complete one application per person. In order to be reviewed by the Caregiver Grant 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.

We cannot review an application for a program with a start date of less than eight 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 three months prior to your selected program start date.

If you have any questions regarding Caregiver Grants, you may contact us by emailing [scholarships@roadscholar.org](mailto:scholarships@roadscholar.org).

**PRO TIP:** You can reserve your spot by enrolling in your selected program before applying! If your application is not approved, you will be refunded your deposit. Just remember that eligible programs are those in the U.S. or Canada and are under \$2,500.

## PERSONAL INFORMATION

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_

Email Address: \_\_\_\_\_

### How did you learn about the Road Scholar Caregiver Grant?

\_\_\_\_\_

## INFORMATION OF PERSON FOR WHOM YOU PROVIDE CARE

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Nature of illness or disability: \_\_\_\_\_

How long have you been this person's caregiver? \_\_\_\_\_

- My loved one lives/d with me       My loved one lives/d at a different address

**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)

**CAREGIVER EXPENSE INFORMATION** *(All information will be kept strictly confidential)*

The Road Scholar Caregiver Grant is financial assistance to attend a Road Scholar educational adventure. Please provide details of your caregiving expenses that help demonstrate your need for financial aid.

If you are arranging substitute care for the time that you will be on the program, please list, detail and provide the estimated cost of substitute caregiver arrangements necessary and attach copies of relevant documentation (i.e., hourly respite care services or the cost of an airline ticket for another family member to fly to your home to provide substitute care).

Otherwise, please list, detail and provide the estimated monthly expenses that your household incurs (or incurred) for your loved one, i.e., skilled and unskilled care; co-payments; home modifications; etc. and attach copies of relevant documentation.

You may also send your most recent tax return to demonstrate financial need.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**YOUR PERSONAL STATEMENT**

The purpose of the personal statement is to help determine why Road Scholar should award you a Caregiver Grant. Please tell us, in specific detail, why you want to learn with Road Scholar and how the experience would impact you as a caregiver. Please include any special circumstances or personal experiences that have influenced your program selection and/or your request for financial aid. This essay is used to help us determine need. When funds are limited, the personal statement can be the deciding factor between one application or another.

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PERSONAL STATEMENT** *(continued)*

---

---

---

---

---

---

---

---

---

---

**TELL US ABOUT YOURSELF**

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

**Gender Identity:** \_\_\_\_\_

**Race/Ethnicity (select all that apply):**

- |   |  |
|---|--|
| <input type="checkbox"/> American Indian or Alaska Native | <input type="checkbox"/> Middle Eastern or North African     |
| <input type="checkbox"/> Asian                            | <input type="checkbox"/> Native Hawaiian or Pacific Islander |
| <input type="checkbox"/> Black or African American        | <input type="checkbox"/> White                               |
| <input type="checkbox"/> Hispanic or Latino               |  |

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

- |  |  |
|--|--|
| <input type="checkbox"/> Some High School        | <input type="checkbox"/> College/ University Degree      |
| <input type="checkbox"/> High School Diploma     | <input type="checkbox"/> Master’s or Professional Degree |
| <input type="checkbox"/> Some College/Univeristy | <input type="checkbox"/> Doctoral Degree                 |
| <input type="checkbox"/> Associate’s Degree      | <input type="checkbox"/> Other (Specify): _____          |

**Employment Status:**    Employed    Retired

**If employed, please tell us in what profession/occupation; if retired, please tell us your last profession/occupation. Please describe if your caregiving responsibilities have impacted your employment in any way.**

---

---

**Do you currently volunteer?**  Yes  No

**Name(s) of volunteer organization(s) and/or activities:**

---

---

---

**TERMS AND CONDITIONS**

By signing this application, you are agreeing to abide by the terms and conditions of the Caregiver Grant 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: Caregiver Grant 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 Caregiver Grant 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 Caregiver Expense sections.
- 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.

*Road Scholar educational adventures are created by Elderhostel, the not-for-profit world leader in educational travel since 1975.*