

## SGO SCHOLARSHIPS AND VOUCHERS

Here are some key things you need to know about the SGO (or Tax Credit) Scholarship Program and the Choice Scholarship Program (also called the voucher program). These are *two different programs*, but they work together in some key ways.

The Choice Scholarship Program provides state-funded scholarships to eligible Indiana students to offset tuition costs at private schools. Your school may or may not be participating in the Choice Scholarship Program.

To be eligible for a Choice Scholarship, students must meet eligibility criteria (including income criteria, which may be more stringent than the chart in this brochure) AND must have a “pathway” to the scholarship. One of the eligible “pathways” is receiving an SGO Scholarship of at least \$500 in a prior year. That means that your student who receives an SGO Scholarship and any siblings would have a “pathway” for a future Choice Scholarship.

A student who meets the requirements for a Choice Scholarship may also qualify for an SGO Scholarship in the same school year, provided that the combination of the two does not exceed tuition and fees.

## FREQUENTLY ASKED QUESTIONS

**What if I had a significant change in income after completing the tax return?** A job loss or other circumstance may result in an income level that is different than your previous year’s tax return would reflect. You may submit proof of your current annual income to your school and ask them to fill out the necessary form to document that change.

**What if we move in the middle of the school year?** The SGO scholarship is not transferable to another school if a student moves.

**What are the benefits of donating to this program?** Donations to the SGO Scholarship Program are tax-deductible at the federal level and also qualify for an Indiana state tax credit of 50% of the value of the donation. Businesses and individuals may make contributions and designate a specific school they wish to support.

**Can I make a donation?** Yes, the donor section of our website [www.s4ec.com](http://www.s4ec.com) will provide all of the information you may need. Please note that you may NOT designate a specific student to receive your gift.

**What is Sagamore Institute?** Sagamore Institute is an Indianapolis-based 501c3 non-profit organization and a certified Indiana Scholarship Granting Organization.



SCHOLARSHIPS FOR  
EDUCATION CHOICE

at SAGAMORE INSTITUTE

## INDIANA’S SGO (or TAX CREDIT) SCHOLARSHIP PROGRAM

### Information for Students and Families

Please visit our website at  
[www.s4ec.com](http://www.s4ec.com)

Contact Us:  
[scholarships@sagamoreinstitute.org](mailto:scholarships@sagamoreinstitute.org)  
317-472-7824

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## DOES MY CHILD QUALIFY?

The statute authorizing the Indiana School Scholarship Tax Credit Program (also called the SGO Scholarship program) requires an eligible scholarship recipient to be:

- A resident of Indiana
- Between 5 and 22 years of age and enrolled in a participating school\*
- A member of a household with an annual gross income (AGI) of 200% or less of the amount required to qualify for the federal free and reduced meal program (see table)

200% of Free/Reduced Meal Income Eligibility Guidelines 2016-2017	
Household Size	Income Limit
1	\$43,956
2	\$59,274
3	\$74,592
4	\$89,910
5	\$105,228
6	\$120,546
7	\$135,901
8	\$151,293
Each Additional	\$15,392

\*Students entering kindergarten must be 5 by August 1st unless the school determines that a child with a later birthdate is kindergarten-ready and agrees to enroll that child in kindergarten.

## HOW IS MY INCOME VERIFIED?

You may use ONE of the options below:

- If your school uses a third-party vendor to collect household income documentation to evaluate financial need (i.e. FACTS, PSAS) and you have submitted all required information, you will not need to provide us with additional documentation.
- OR provide a copy of Federal or State Tax Return for ALL members of a household. MUST be for the taxable year IMMEDIATELY preceding the date the scholarship application was submitted. *Tax returns should be for 2015 when applying for the 2016-17 academic year.*
- OR, if your school accepts Choice Scholarships (vouchers) and you have been approved for one in the year for which you are applying, you can use (a) a copy of the approval document received from the Department of Education, or (b) a copy of the approval available to the school verifying Choice Scholarship eligibility.
- OR, provide a copy of participation cards or benefit statements for TANF or Food Stamps/SNAP.

NOTE: To determine household size, include anyone living in the household at the time of application (parents or legal guardians, children, grandparents, other relatives and unrelated individuals, including foster children). If the applicant is a foster child, written proof automatically qualifies the child for the scholarship.

## HOW DO I APPLY?

First, your child must be enrolled at a participating private school. The school will provide you with a link to our online application. Simply fill out and submit the online application for the 2016-17 school year. The income documentation needed will be collected by the school and forwarded to us.

For a list of all schools participating with Scholarships for Education Choice, please visit our website at [www.s4ec.com](http://www.s4ec.com). Click on Students & Households and then on Partner Schools.

## HOW IS THE SCHOLARSHIP AMOUNT DETERMINED?

The scholarships are funded by private donations. If you meet the income thresholds and the application is approved, we will work with the school to determine the scholarship amount based on available funds and your school's financial aid policies. Scholarships may be denied if funding is not available.

## HOW WILL I KNOW IF A SCHOLARSHIP IS AWARDED?

The school will be your primary contact throughout the process. If a scholarship is awarded, the funds are paid directly to the school and applied to your tuition account. The funds may be combined with other financial assistance offered by your school.