



## **2024-25 Scholarship Application Process**

Children First Education Fund (CFEF) will accept applications for the Carson Smith Opportunity Scholarship (CSOS) program anytime throughout the year from parents on behalf of the parent's student. Scholarships are intended solely for the benefit of children with disabilities to help cover the cost of a qualified student's educational expenses for private school or homeschool during a given school year.

The school year timeframe that scholarships will be granted is July 1, 2024 through June 30, 2025. Applications received after the start of the school year (or July 1<sup>st</sup>), which are approved, may be prorated appropriately to reflect the amount of time remaining in the school year.

Scholarship applications can be found at [www.cfe-fund.org](http://www.cfe-fund.org).

## **CHILDREN FIRST EDUCATION FUND APPLICATION GUIDE**

CFEF application will contain the following acknowledgement to be made by the parent or guardian of the student applying:

- *I acknowledge that: A private school may not provide the same level of disability services that are provided in a public school. I will assume full financial responsibility for the education of my scholarship recipient if I accept this scholarship. Acceptance of this scholarship has the same effect as a parental refusal to consent to services as described in 24 C.F.R. Sec. 300.300, issued under the Individuals with Disabilities Education Act, 20 U.S.C. Sec. 1400 et seq., and my child may return to public school at any time.*

The CFEF scholarship application will request a variety of information from the parent or guardian that must verify eligibility for a scholarship and determine the amount of a scholarship based. The criteria below will be included in the application.

### **Scholarship Applicant Verification**

As part of the application process, a child and family must meet all of the criteria below in order to be considered for a scholarship:

- The applicant is able to participate in preschool, kindergarten or grades 1-12 in public school.
  - **A copy of the child's birth certificate must be attached.**
- The applicant and parental guardian are residents of the state of Utah.
  - **The applicant must attach proof of residency.** The following documents may be used to offer proof of residency:
    - Bank statement (dated within 60 days)

- Court documents (dated within 60 days)
  - Current mortgage or rental contract
  - Major credit card bill (dated within 60 days)
  - Property tax notice (statement or receipt dated within one year)
  - School transcript (dated within 60 days)
  - Utility bill, excluding cell phone bills (billing date within 60 days)
  - Valid Utah vehicle registration or title
- The applicant must have a qualified disability as defined by the Individual with Disability Education Act (IDEA), [§§Section 300.8](#), which states that a child’s school performance must be adversely affected by a disability in one of the following categories of disabilities:
  - **Specific learning disability (SLD).** The SLD category covers a specific group of learning challenges. These conditions affect a child’s ability to read, write, listen, speak, reason, or do math. Some examples include dyslexia, dyscalculia, or written expression disorder (dysgraphia).
  - **Other health impairments.** This category covers conditions that limit a child’s strength, energy, or alertness which adversely affect a child’s education. Examples include ADD, ADHD which impacts attention and executive function, diabetes, epilepsy, heart conditions, hemophilia, lead poisoning, leukemia, nephritis, rheumatic fever, sickle cell anemia and Tourette syndrome.
  - **Autism spectrum disorder (ASD).** ASD is a developmental disability. It involves a wide range of symptoms, but it mainly affects a child’s social and communication skills. It can also impact behavior.
  - **Emotional disturbance.** Various mental health issues can fall under this category including anxiety disorder, schizophrenia, bipolar disorder, obsessive-compulsive disorder, or depression.
  - **Speech or language impairment.** This category covers difficulties in speech or language. A common example is stuttering. Other examples are trouble pronouncing words or making sounds with the voice. It also covers language problems that make it hard for kids to understand words or express themselves.
  - **Visual impairment, including blindness.** A child who has eyesight problems is considered to have visual impairment. This category includes both partial sight and blindness. If eyewear can correct a vision problem, then it doesn’t qualify.
  - **Deafness.** Kids with a diagnosis of deafness fall under this category. These are kids who can’t hear most or all sounds, even with a hearing aid.
  - **Hearing impairment.** This refers to a hearing loss not covered by the definition of deafness. This type of loss can change over time. Being hard of hearing is not the same thing as having trouble with auditory or language processing.
  - **Deaf Blindness.** Kids with a diagnosis of deaf blindness have both severe hearing and vision loss. Their communication and other needs are so unique that programs for just the deaf or blind can’t meet them.
  - **Orthopedic impairment.** This includes a lack of function or ability in their bodies. An example is cerebral palsy.

- **Intellectual disability.** Kids with this type of disability have below-average intellectual ability. They may also have poor communication, self-care, and social skills. Downs Syndrome is one example of this category.
- **Traumatic brain injury.** This is a brain injury caused by an accident or some kind of physical force.
- **Multiple disabilities.** A child with multiple disabilities has more than one of these conditions. Having multiple issues creates educational needs that can't be met in a program designed for any one disability.
- **The applicant must provide proof of a qualified disability** that is verified by one of the following documents:
  - An Individualized Education Plan (IEP). The IEP must be current and not expired (within 3 years of origin of the IEP). An IEP is a plan or program developed to ensure that a child who has a disability under the law, and is attending public school, receives specialized instruction or related services in a public-school setting. The IEP is required to be submitted with the application. This document should indicate whether the student would qualify as Level 1 (needing less than 180 minutes per day of special education resources) or Level 2 (needing more than 180 minutes per day of special education resources)
  - Assessment Team Meeting Record (ATMR). Students switching from the legacy Carson Smith Scholarship program to the new CSOS program, may submit a valid ATMR (received within the 3 years from the date on the form) from a local school district to verify disability. This document should indicate whether the student would qualify as Level 1 (needing less than 180 minutes per day of special education resources) or Level 2 (needing more than 180 minutes per day of special education resources)
  - Multidisciplinary Evaluation Team (MDT) evaluation. The MDT is defined as an evaluation of a child's qualified disability by two or more qualified and credentialed individuals from two or more separate disciplines or professions. [The MDT form can be downloaded here.](#) The MDT must indicate if the child's disability adversely affects the child's school performance. Qualified individuals can be from one of the following disciplines (this is not an exhaustive list, contact us with questions):
    - Medical Professional
      - MD (Medical doctor)
      - PA (Physician assistant)
      - APRN (Advanced practice registered nurse)
      - DO (Doctor of osteopathic medicine)
    - Education Professional
      - Licensed teacher
      - Licensed special education teacher or counselor
      - School administrator
    - Mental Health Professional
      - PsyD (Doctor of Psychology)
      - LCSW (Licensed clinical social worker)
      - LPC/LCPC (Licensed professional counselor)
      - NCSP (Nationally certified school psychologist)

- CMHS (Clinical mental health counselor)
  - MSC (Master of Science in school counseling)
  - ACMHC (Associate clinical mental health counselor)
  - Other
    - Speech language therapist
    - Occupational therapist
    - Behavioral therapist
    - Audiologist
    - CALT (Certified academic language therapist)
    - A/AOGPE (Certified dyslexia specialist)
- The MDT evaluation must consider all data and relevant information, involve the parent(s), determine the student has a qualifying disability, and is eligible to receive special education services as determined by IDEA. In interpreting evaluation data for the purpose of determining that the child has a qualifying disability and determining the educational needs of the child, the MDT must draw upon information from a variety of sources, including aptitude and achievement tests, parent input, teacher recommendations, physical condition, social or cultural background, and adaptive behavior; and ensure that information obtained from all of these sources was documented and carefully considered. With the submission of an MDT evaluation the parent or guardian must acknowledge the following:
  - *Eligibility for a scholarship as determined by a multidisciplinary evaluation team under this program does not establish eligibility for an IEP under the Individuals with Disabilities Education Act, Subchapter II, 20 U.S.C. Secs. 1400 to 1419 and is not binding on any LEA that is required to provide an IEP under the Individuals with Disabilities Education Act.*
- **The applicant has a verified enrollment or intent to enroll at a qualifying school or has been identified to be a homeschool student.**
  - If the student plans to attend a private school, **an acceptance letter from a qualifying private school must be attached to the application.**
    - *The applicant's parent or guardian must acknowledge that the qualifying school selected by the parent for the applicant to attend using a scholarship can provide the level of disability services required for the student.*
  - If the student plans to be homeschooled, the applicant's parent or guardian must indicate such, and attach a copy of the **notarized affidavit submitted to the LEA that the school-aged child will attend home school** and that the parent assumes sole responsibility for the education of the school-aged child.
- **The applicant cannot be a student who receives a scholarship under the legacy Carson-Smith Scholarship Program nor the Utah Fits All program** in the same school year as the scholarship award. This will be verified with the Utah State School Board office who administers the Carson-Smith Scholarship Program and ACE Scholarships who administers the Utah Fits All scholarship program.
- **Applicants cannot be a public-school student at the time the scholarship is received.** The student must be unenrolled from public school.

- Students may apply for the scholarship while still enrolled in public school. If awarded, and before the payment of the award can be made, **a verification of withdrawal from public school is required.**
- Scholarship awards are based on gross income of the scholarship recipient's family measured against the Federal poverty level as defined by the most recently revised poverty income guidelines published by the United States Department of Health and Human Services in the Federal Register, and the household size of the scholarship recipient.
  - Family income consists of the total gross annual income received by the parent(s) or legal guardian(s) with whom the scholarship student resides. This figure comprises the earnings of the parent(s) or legal guardian(s) with whom the scholarship student resides. Sources of income are those which are included on standard IRS tax forms, including: wages, tips, bonuses, salaries, retirement income, investment income, Social Security benefits, and earnings from other income sources.
  - Household size is determined by everyone who lives under the same roof as the scholarship recipient, whether they are related or not.
  - **A scholarship applicant's parent(s), or legal guardian(s) with whom the applicant lives must submit proof of their annual income.** The preferred income verification document is the most recent IRS tax return for each person. CFEF requires only the first page of the tax return that shows the adjusted gross income and the number of dependents. All income that is required to be reported on the federal tax return must be considered for scholarship awards. If no tax return is available, other income verification documents include:
    - Two pay stubs dated within the past 60 days
    - Recent W2 Form
    - Recent 1099 Form
    - Profit/loss statement from a CPA for self-employed parents
- Unemployment documentation dated within the past 60 days
- Funds are awarded to students using the weighted pupil unit (WPU) as defined by the state as the amount established each year as in the enacted public education budget. Scholarship award amounts are distributed as follows:
  - Scholarship students whose family income is at or below 185% of the federal poverty level will receive the value of the WPU multiplied by 2.5.
  - Scholarship students whose family income is above 185% of the federal poverty level will receive the value of the WPU multiplied by 2.0.
  - Scholarship students whose family income is above 185% of the federal poverty level, and the student has documentation stating that the child would receive Level 2 special education resources (180 minutes or more per day of special education services in a public school) will receive the value of the WPU multiplied by 2.5. Either an IEP or an ATMR is required to verify Level 2 status.
  - For eligible students attending a formal preschool in a private school the value of the WPU.
  - For eligible siblings (see below) of qualified students in kindergarten through grade 12, who attend the same private school as the eligible student, the value of the WPU multiplied by 0.5.

- For the 2024-25 school year the amount of scholarship awards based on this formula are reflected in the chart below:

<b>2024-25 Estimated Scholarship Awards</b>						
(based upon Weighted Pupil Unit (WPU) of \$4,443, and Federal Poverty Level (FPL))						
<b>For all students kindergarten through grade 12</b>						
<b>Family Size</b>	<b>Income less</b>	<b>Eligible</b>	<b>Income</b>	<b>Eligible</b>	<b>Income</b>	<b>Eligible</b>
2	< \$37,814	\$11,107.50	> \$37,814	\$11,107.50	> \$37,814	\$8,886.00
3	< \$47,767	\$11,107.50	> \$47,767	\$11,107.50	> \$47,767	\$8,886.00
4	< \$57,720	\$11,107.50	> \$57,720	\$11,107.50	> \$57,720	\$8,886.00
5	< \$67,673	\$11,107.50	> \$67,673	\$11,107.50	> \$67,673	\$8,886.00
6	< \$77,626	\$11,107.50	> \$77,626	\$11,107.50	> \$77,626	\$8,886.00
7	< \$87,579	\$11,107.50	> \$87,579	\$11,107.50	> \$87,579	\$8,886.00
8	< \$97,532	\$11,107.50	> \$97,532	\$11,107.50	> \$97,532	\$8,886.00
9	< \$107,485	\$11,107.50	> \$107,485	\$11,107.50	> \$107,485	\$8,886.00
10	< \$117,438	\$11,107.50	> \$117,438	\$11,107.50	> \$117,438	\$8,886.00
<b>Preschool student scholarship amount = \$4,443.00</b>						
<b>Sibling scholarship amount = \$2,221.50</b>						
*student disability must also qualify for 180 minutes per day of special education in a public school						

Sibling Scholarship Applicant Verification

- The sibling applicant is able to participate in kindergarten or grades 1-12 in public school.
- The sibling applicant is a resident of the state of Utah.
- The sibling applicant resides in the same household as a recipient of a scholarship awardee.
- The sibling applicant has a verified enrollment or intent to enroll at a qualifying school.
- The sibling applicant is applying for a scholarship to attend the same qualifying school as the scholarship awardee with a disability.

Conflict of Interest Verification

- A scholarship applicant is not eligible for a tuition scholarship if their parent or legal guardian is an administrator of the qualifying school they will attend.

- A scholarship applicant is not eligible if their parent or legal guardian or a relative of the parent or legal guardian is an officer or member of the board of Children First Education Fund (CFEF).
  - A relative is defined as father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law of the parent or legal guardian.

### Awarding Scholarship Funds

Upon acceptance of a scholarship, the parent assumes full financial responsibility for the education of the scholarship recipient. The parent or guardian must acknowledge that creation of the scholarship program and the granting of a scholarship does not imply that a public school did not provide a free and appropriate public education for a student or constitute a waiver of admission by the state.

- Qualified applicants with disabilities will be given priority.
- Qualified sibling applicant awards will be distributed if funds exist after awarding scholarships to qualified students with disabilities first.
- Scholarship funds are awarded to eligible students by CFEF for the purpose of paying for qualified educational expenses. A qualified scholarship expenses mean an expense that a parent or eligible student incurs in the education of the eligible student for goods or a service that a qualifying private school or homeschool provides or facilitates. The law governing the Carson Smith Opportunity Scholarship program specifies the categories of expenses that are allowed. These categories of expenses are defined as:
  - Tuition for a qualifying school
    - Tuition for a qualifying school must be published at the beginning of the school year, and may not be adjusted for scholarship students.
  - Fees for a qualifying school
    - Fees for a qualifying school must be published at the beginning of the school year.
    - Additional fees required for special needs education may be assessed, as long as they are clearly defined and a written disclosure is provided to the parent of each prospective scholarship student before the student is enrolled at the beginning of the school year.
    - Scholarship funds may be used to cover additional fees for special needs educational programs.
  - Instructional materials which include the content or information conveyed within a prescribed educational course. Examples include lectures, readings, related books, multimedia components or other resources prescribed by the course.
  - Tutoring services providing private academic support delivered by a proven expert with a deep knowledge or defined expertise in a particular subject or set of subjects.
    - Tutors must be approved by CFEF prior to providing tutoring services in order for scholarship funds to be used to cover tutoring costs.
    - Tutor credentials, experience, and expertise will be evaluated as part of the approval process.
  - Fees for after-school or summer education programs. Examples include:
    - Organized sports programs

- Music programs
  - STEM programs
  - Drama or other cultural activities
  - Arts and crafts activities
  - Vocational programs
- Textbooks, curricula, or other instructional materials including any supplemental materials or associated online instruction that a curriculum or a qualifying school recommends.
- Educational software and applications.
- Supplies such as office supplies or equipment related to an eligible student's educational needs such as a whiteboard.
- Computer hardware or other technological devices that are intended primarily for an eligible student's educational needs.
- Fees for the following examinations, or for a preparation course for the following examinations, that are approved by CFEF:
  - A national norm-referenced or standardized assessment
  - An advanced placement or similar assessment examination
  - A state-recognized industry certification examination
  - An examination related to college or university admission
- Educational services for students with disabilities from a licensed or accredited practitioner or provider, including occupational, behavioral, physical, audiological, or speech-language therapies.
- Contracted services approved by CFEF provided by a public school, including individual classes, after-school tutoring services, transportation, or fees or costs associated with participation in extracurricular activities
- Ride fees or fares for a fee-for-service transportation provider to transport the eligible student to and from a qualifying school, not to exceed \$750 in a given year
- Expenses related to in-state extracurricular activities, field trips, educational supplements and other educational experiences.
- Other educational related expenses approved by CFEF.
- Homeschool parents can request a pre-approval for expenses not specifically listed above. A purchase can be made without pre-approval but will not be guaranteed reimbursement.
- It is highly recommended that parents prepare an annual education plan for their homeschooled children and project the cost of the plan to ensure the best utilization of scholarship funds.
- If a scholarship recipient transfers to another qualifying school during the school year, CFEF may prorate scholarship money between the qualifying schools according to the time the scholarship recipient spends at each school.
- Any misuse, misrepresentation or fraud involving scholarship funds will result in immediate forfeiture of the scholarship and parents will be liable for repayment of the scholarship funds expended.
- Preferred method of purchase of items not specifically identified in the list above is to be pre-approved by the Children First Education Fund.
- If pre-approval is not convenient, the following list of criteria must be attached to reimbursement requests:



- Computer generated itemized receipt identifying the vendor, location of purchase, and vendor contact information validating amount of item(s) purchased and verifying purchase. Receipts should not include other items purchased which are not for consideration for reimbursement
- For items which are not purchased by a commercial vendor, a receipt or bill of sale must be provided listing the item(s) purchased at what price and include the name, address and phone number of the vendor, as well as the method and amount of payment.
- If the vendor provides an invoice, families may submit a copy of the invoice along with a canceled check or credit card receipt identifying the vendor and amount paid.