



DIOCESE OF FORT WAYNE - SOUTH BEND  
OFFICE OF CATHOLIC EDUCATION

915 S. CLINTON STREET, P.O. BOX 390 • FORT WAYNE, INDIANA 46801

**MEMORANDUM**

**TO:** *Pastors, Principals, Business Managers & Secretaries*

**CC:** *Large Family Fund Committee Members: John Tippmann, Sr., Joe Ryan, Msgr. Robert Schulte, Rev. Cyril Fernandes, and Marsha Jordan.*

**FROM:** *Karen De Rose - Office of Catholic Education*

**DATE:** *Wednesday, February 11, 2015*

**RE:** *Large Family Fund Application Process for 2015-2016 Academic Year*

FACTS Grant & Aid Assessment will again be conducting the financial need analysis for the Large Family Fund for the Diocese of Fort Wayne - South Bend in the upcoming 2015-2016 school year. Families interested in consideration for tuition assistance from these funds will need to complete an application and submit the necessary supporting documentation to FACTS Grant & Aid Assessment by September 1, 2015. Some features of FACTS includes:

- Complete confidentiality of FACTS application.
- Families can apply online or use a traditional paper application; fee is \$30 per family.
- Families with children attending multiple schools need only fill out one application provided by the school or online at [www.factstuitionaid.com](http://www.factstuitionaid.com).
- The diocese can follow the status of an application through an online tracking system.
- Analysis and financial reports by FACTS are provided online to the diocese.
- Reports can be created and customized to meet the needs of the Large Family Fund committee.
- The diocese has the ability to better target those families most in need of tuition assistance from the Large Family Fund.

The FACTS Grant & Aid Assessment will allow the diocese to review applications from families at each school. Families with three or more children in Catholic schools will be automatically eligible for the Large Family Fund.

At the professional development meeting in February, the Office of Catholic Education provided principals this memorandum and announced that it would keep a few applications on hand (English and Spanish), but schools are responsible for acquiring FACTS applications on their own or encourage their families to apply online. Applications cannot be duplicated or faxed.

In order to keep pastors, principals, business managers, and secretaries familiar with the process for applying for Large Family Fund Tuition Assistance, following is included the details on eligibility and the application procedure:

**Eligibility:**

1. Must have three or more students who are currently attending or would attend a Catholic elementary and/or high school in the Diocese (Kindergarten through Grade 12), and
2. At least one parent must be an active registered parishioner (verified by the parish by notification from the Office of Catholic Education), and
3. Must apply for tuition assistance at the local school level (following school procedure), and Must apply for Large Family Fund tuition assistance using FACTS Grant & Aid Assessment by September 1, 2015, and
4. Family is not receiving a School Choice Scholarship (voucher).

**Application Procedure:**

1. Families need to apply only once, either by using the FACTS application from the elementary school or high school (if already contracted with FACTS), or apply online. The family pays the \$30 application fee.
2. Families would follow school procedures for applying for assistance at the local level. To be considered for Large Family Fund, families must apply to FACTS Grant & Aid by September 1, 2015, regardless of the school deadline. All applications verified by FACTS by this date will be considered. Applications will not be accepted after this date.
3. Families are required to submit copies of their **2014 IRS Federal Income Tax Return** and any supporting tax schedules, and copies of all **2014 W-2 Wage and Tax Statements**, regardless of school requirements, which may be different. This is the information required to be considered for Large Family Fund.
4. After September 1, 2015, the diocese will download names from the online FACTS system of those families that have three or more children in our schools, have a **verified** or **complete** application submitted to FACTS (no supporting documentation or application information is missing), and confirm that these families have been verified at the parish level that they are active / registered parishioners. Families receiving a School Choice Scholarship (voucher) will also be identified. This is the information that the committee will work from at their distribution meeting.
5. ALL families applying to FACTS Grant & Aid Assessment for Large Family Fund consideration must be an active / registered parishioner. The Office of Catholic Education will send to the parishes a list of those families that are eligible for Large Family Fund. The parish will verify on the form whether the families are active / registered parishioners. The completed form will be returned to the Office of Catholic Education.
6. The Large Family Fund Committee will meet in **October** to determine awards for tuition assistance. The schools and parishes will be notified of family awards following the committee meeting. The family should be notified of their award for the 2015-2016 school year by the school, not the diocese. Families are encouraged to complete the Free and Reduced lunch forms.
7. If the school chooses to contract with FACTS for evaluation of families applying for local school aid, please contact Bill Skidmore, Senior Vice President for FACTS, at 800.468.9650 or by e-mail at [bskidmore@factsmgt.com](mailto:bskidmore@factsmgt.com). Unless the school is contracted with FACTS, the school will not be able to access financial information on their families.

We appreciate your cooperation and understanding while the committee makes changes from year to year in order to make the Large Family Fund application process through FACTS Grant & Aid as smooth as possible. If you have any questions or concerns about the application process, you may speak with Karen DeRose in the Office of Catholic Education, at (260) 422-4611 extension 3316 or by e-mail at [kderose@diocesefwsb.org](mailto:kderose@diocesefwsb.org).