



Exception Request Form

(One Student per Form)

TO BE COMPLETED BY SCHOOL PERSONNEL. The principal/president transmits to superintendent (independent schools may send to GRACE executive director) by e-mail.

<i>Name of school and city</i>			<i>Date</i>		
<i>Name of student</i>			<i>Name of parent(s)/guardian(s)</i>		
<i>School Yr.</i>	<i>Grade</i>	<i>Candidate status</i>	<i>AGI</i>	<i>No. of persons in family/household</i>	<i>Calculated financial need</i>

Request exception to the following policies (see page 2 for more information):

Policy item #1: _____ **Policy item #2:** _____

Policy item #3: _____

Background/justification - a short statement

Request – a sentence concisely stating the particulars of the request

Submitted by: _____ *Type name of principal/president* _____ *Telephone*

TO BE COMPLETED BY SUPERINTENDENT. (GRACE EXECUTIVE DIRECTOR FOR INDEPENDENT SCHOOLS). SUPERINTENDENTS SUBMITS TO EXECUTIVE DIRECTOR BY E-MAIL.

_____ *Type name of superintendent/GRACE exec. dir.* _____ *Date* _____ *Action*

Comments (optional):

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Instructions for Principals/Presidents and Scholarship Coordinators

The form is a fill-in PDF. Type the form, save it, and forward it to the next party by e-mail, i.e., the principal/president sends the form to the superintendent, the superintendent sends the form to the executive director by e-mail. In the case of independent schools, the principal/president may send the form to the executive director of GRACE Scholars.

No signatures are required. The e-mail transmitting the form serves as an electronic signature.

Use one form per student.

AGI, No. of dependents, calculated financial need. This information is provided by FACTS or other financial service provider. The three elements are considered in tandem. If any of these items is not available, enter an estimate or 0 (zero) and explain the situation in the Background/justification section.

Policy items #1, #2 and #3. These fields have drop down menus. You must choose at least one policy item in Policy item #1. If the menu does not contain the policy item for which you are requesting an exception, you can type a short name directly into the field.

Policy Definitions

The policy items listed in the drop down menus are the most common items for which exceptions are requested. The following are excerpts from the GRACE Scholarship Policy which is available through the Scholarship Portal.

Calculated financial need (CFN). All applicants must demonstrate calculated financial need as determined by FACTS Management Company (FACTS) or other nationally recognized financial aid service. The annual installment of a GRACE award cannot exceed the calculated financial need as determined by the external financial aid service firm. CFN must be calculated annually to determine eligibility for renewal of a GRACE award. (GRACE policy 4100)

Safe Harbor for renewal candidates. The board of directors created the Safe Harbor provision for recipients whose CFN dropped below the minimum annual award and are at risk of losing future SSO eligibility as well as the student's current award. The principal/president may request a Safe Harbor exception of \$200 per year following the process indicated in policy 4400. It is the responsibility of the principal/president to make a credible and substantive case that the student's family financial state warrants a Safe Harbor. A Safe Harbor exemption must be renewed annually. (GRACE policy 4100)

September 1 rule. Recommendations shall not be accepted after September 1 or if the application file is incomplete. However, if the executive director determines an application received by September 1 is deficient in required documentation, he or she may, with the concurrence of the principal or president of the school, grant an extension of up to ten (10) business days to remedy the situation. If the extension passes without a successful remedy, the executive director shall deem the application incomplete and terminate consideration. The *last minute application rule* also applies (see policy 4300, section 2). (Policy 4200)