

# Direct Grant Application Prep Pack

INFORMATION NECESSARY TO COMPLETE A DIRECT GRANT APPLICATION

# US Retail Share Fund

## Application Check List

This packet provides the information you will need to apply for a US Retail Share Fund grant. This packet **IS NOT** the grant application.

This packet provides a check list for US Retail associates to use as a guide for completing an application. Associates must complete the following before submitting an application:

- Review enclosed information.
- Gather supporting documentation relevant to your situation.
- Submit application online at [WWW.STAPLESHAREFUND.ORG](http://WWW.STAPLESHAREFUND.ORG)

*Your application will not be considered complete until you have completed all the above steps.*

**ELIGIBILITY**

The Share Fund will assist when there is an exhibited financial need. It is possible to have a qualifying event AND a qualifying expense, but not meet the eligibility for a Share Fund grant, because you have the financial means to pay the expense you are requesting from US Retail Share Fund.

**QUALIFYING EVENTS AND EXPENSES**

Below is a chart listing the basic eligibility for a US Retail Share Fund grant. This chart is a very reliable way of determining if your hardship qualifies for a Share Fund grant. It is important to remember the circumstances below cover the associate, their spouse or domestic partner, or legal dependents ONLY. Parents, grandparents and siblings generally do not fall in this category. If your situation is not in this chart, then you most likely will not be able to receive assistance through the Share Fund.

*IMPORTANT NOTE ABOUT QUALIFYING EXPENSES:* Federal law prohibits the US Retail Share Fund from making any grants designed to replace or supplement US Retail compensation or benefits to its associates. Due to this law, the Share Fund CANNOT provide grants to pay for medical expenses.

**DOCUMENTATION**

The list below shows basic document requirements based on the qualifying event. However, once the application has been received, additional information not included on this list may be required. The Share Fund will inform the applicant via email and phone to request additional information.

Your prompt attention to the request for additional information is appreciated.

Qualifying Event	Qualifying Expense <i>(Caused by Qualifying Event)</i>	Required Documentation
<p><b>Illness or Injury</b> To assist associates or immediate family member (spouse/domestic partner or dependents ONLY) who have encountered financial hardships for reasons beyond their control due to an illness or injury with household expenses or travel expenses to appointments. (Includes Mental Health)</p> <p>Event must have occurred within last 12 months.</p>	<ul style="list-style-type: none"> <li>• Past Due or soon to be past due rent or mortgage.</li> <li>• Past Due or soon to be past due basic utilities*</li> <li>• Travel expenses to attend appointments, hospital stay or medical reasons.</li> <li>• Other household expenses to include things such as laundry or meal service, etc.</li> </ul> <p>*Covered utilities include gas, electric and water only.</p> <p><i>Note: Share Fund does not provide funding for medical bills.</i></p>	<ul style="list-style-type: none"> <li>• Medical leave documentation or FMLA<sup>1</sup> form (if applicable).</li> <li>• Doctor’s note documenting dates associate was not able to work.</li> <li>• Itemized medical bill statement to prove illness/injury occurred.</li> <li>• Documentation of time off from work due to medical reasons.</li> <li>• Travel receipts to attend appointments, hospital stay or medical event.</li> <li>• Copies of past due or soon to be past due rent/mortgage or basic utilities.</li> </ul>

<sup>1</sup> PLEASE NOTE the US Retail Share Fund DOES NOT require details on diagnosis. We simply need to know the associate is unable to work during a particular time frame as a result of their doctor's instruction.

Qualifying Event	Qualifying Expense (Caused by Qualifying Event)	Required Documentation
<p><b>Death</b> Available to assist those who have incurred the loss of an associate or immediate family member (spouse/domestic partner, parent, or dependents ONLY) if the associate is financially responsible for arrangements. An associate's spouse/domestic partner may apply for assistance in the event of an associate's death.</p>	<ul style="list-style-type: none"> <li>Essential funeral expenses for deceased family member or associate.</li> <li>Travel expenses to attend the funeral or to make funeral arrangements</li> <li>Past due rent or mortgage.</li> <li>Past due basic utility bills.*</li> </ul> <p>*Covered utilities include gas, electric and water only</p>	<ul style="list-style-type: none"> <li>Itemized funeral invoice or estimate with the name of person who is responsible for paying the expense.</li> <li>Proof of the death of relative (death certificate and/or obituary)</li> <li>Transportation receipts showing cost and date of travel to funeral or travel to plan arrangements.</li> <li>Past due rent or utility bills*.</li> </ul>
<p><b>Natural Disaster</b> (hurricane, tornado, flood, fire, ice/wind/snowstorm affecting the associate's primary residence).</p> <p>Associate's primary residence is severely damaged, destroyed or rendered unlivable by a localized natural disaster (fire, flood, tornado, mudslide, etc.) or federally/state declared natural disaster or terrorist attack, civil unrest, or associate is displaced from home and forced to pay for temporary housing.</p> <p>Event must occur while associate is employed with Staples.</p> <p>Does not cover associate's 2<sup>nd</sup> home, rental property or other building on associate's property or boats.</p>	<ul style="list-style-type: none"> <li>Temporary housing in case primary residence is uninhabitable.</li> <li>Food and necessities due to loss of power or home damage or total loss</li> <li>Uninsured/Underinsured needed repairs to primary residence.</li> <li>Security deposit to move into a new residence.</li> <li>Household expenses that are past due or will be past due as a result of loss of income (rent/mortgage, utilities*).</li> </ul> <p>*Covered utilities include gas, electric and water only.</p>	<ul style="list-style-type: none"> <li>Photos of damage to home or car/primary vehicle (smartphone photos accepted).</li> <li>Itemized repair estimate for primary residence from a contractor.</li> <li>Copies of any temporary housing receipts from hotels.</li> <li>List of necessary items lost due to the disaster (clothing, food, shelter, vehicle)</li> <li>Homeowner's insurance deductible information, detail of damage and what is covered.</li> <li>Statement from community organization assisting associate (i.e. American Red Cross, fire/police department, shelter, etc.).</li> <li>Copies of past due or soon to be past due rent/mortgage or basic utilities.</li> <li>Lease agreement from NEW landlord showing security deposit amount.</li> </ul>
<p><b>Unemployment</b> Loss of a spouse's job or associate's second job due to a lay-off or company closure within the past 6-months. <b>US Retail jobs excluded.</b></p> <p>Event must occur while associate is employed with Staples and in last 12 months.</p> <p><b>Not Covered:</b> loss of Staples job, behind on rent/utilities with no triggering event, car (general maintenance, accident, car no longer works), reduction of hours or overtime for Staples job. For loss of 2<sup>nd</sup> job or Spouse job – we reserve all rights to deny a grant based on circumstances of the job loss.</p>	<ul style="list-style-type: none"> <li>Copy of past due or soon to be past due rent/mortgage</li> <li>Copy of past due or soon to be past due utility bills*</li> </ul> <p>*Covered utilities include gas, electric and water only.</p>	<ul style="list-style-type: none"> <li>Copy of the termination letter with date and reason of termination, or</li> <li>Copy of paperwork from unemployment office, showing date and reason of separation.</li> <li>Copy of past due or soon to be past due rent/mortgage or utilities statement.</li> </ul>

Qualifying Event	Qualifying Expense (Caused by Qualifying Event)	Required Documentation
<p><b>Housing Instability</b> Associates in need of new housing due to:</p> <ul style="list-style-type: none"> <li>Rental unit/home condemned or deemed uninhabitable due to unsafe living conditions.</li> <li>Unforeseen sale/foreclosure of a home rented from a private landlord and the associate is forced to find new residence with less than 30 days' notice. (foreclosure of a home owned by the associate DOES NOT fit this circumstance.)</li> </ul> <p>Event must occur while associate is Employed with Staples and in time frame noted above.</p> <p>Does not cover:</p> <ul style="list-style-type: none"> <li>Reduction in hours or O/T hours</li> <li>Roommate moved out</li> <li>Fell behind on bills</li> </ul>	<ul style="list-style-type: none"> <li>Provide quote to repair/correct unsafe living conditions not covered by landlord or insurance company.</li> <li>Security deposit to move into a new residence.</li> </ul>	<p><u>Unsafe/Uninhabitable Living Conditions:</u></p> <ul style="list-style-type: none"> <li>Inspection report, or other documentation showing how the home is uninhabitable or unsafe living conditions.</li> <li>Quotes for repairs not covered by insurance, to make home safe/inhabitable.</li> <li>Receipts for temporary housing if unable to stay in home while repairs are being completed.</li> </ul> <p><u>Eviction:</u></p> <ul style="list-style-type: none"> <li>Eviction notice or Cour Order with reason for eviction</li> <li>Associates requesting assistance as a result of the sale or foreclosure on their RENTED residence are REQUIRED to submit proof of the sale or foreclosure including:                             <ul style="list-style-type: none"> <li>Foreclosure notice from the landlord or owner of the rented property.</li> <li>Documentation showing the property is for sale.</li> <li>Current lease or proof of address.</li> </ul> </li> <li>Lease agreement from NEW landlord showing security deposit amount.</li> </ul>
<p><b>Domestic Abuse</b> Associate in unsafe home environment and is need of new housing.</p> <p>Event must occur while associate is employed with Staples and in last 12 months.</p>	<ul style="list-style-type: none"> <li>Security deposit to move into new residence.</li> <li>First Month's rent to move into a new residence.</li> <li>Temporary housing if needed</li> <li>Replace daily care items left behind when fleeing unsafe environment. (i.e., clothes, toiletries)</li> <li>Provide assistance with rent/mortgage and utilities (electric, gas, water only) owed at unsafe environment if required to pay prior to new lease.</li> </ul>	<ul style="list-style-type: none"> <li>Police report or restraining order documenting the abuse.</li> <li>Letter/note from pastor, social worker, school counselor, etc.</li> <li>Lease agreement from NEW landlord showing security deposit and first month rent amount.</li> <li>Copy of past due bills.</li> <li>List of items to be replaced.</li> </ul>

Qualifying Event	Qualifying Expense <i>(Caused by Qualifying Event)</i>	Required Documentation
<p><b>Military Deployment</b> Associate, immediate family member or spouse/domestic partner who has encountered financial hardships after being deployed.</p> <p>Event must occur while associate is employed with Staples and in last 12 months.</p>	<ul style="list-style-type: none"> <li>• Rent or mortgage (don't have to be past due).</li> <li>• Utilities* (don't have to be past due).</li> <li>• Other bills where assistance is needed.(i.e., spouse no longer able to work due to spouse deployment, food)</li> </ul> <p>*Covered utilities include gas, electric and water only</p>	<ul style="list-style-type: none"> <li>• Copy of deployment orders.</li> <li>• Copy of basic utility bills.</li> <li>• Copy of rent/mortgage statement.</li> </ul>

## All Applications – Required Documentation

To ensure prompt processing of a Share Fund grant, please gather the appropriate documents before submitting your application. The application is not complete until we have received ALL relevant supporting documentation.

### **REQUIRED FOR ALL APPLICATIONS:**

1. **Copies of bills for which associate is seeking assistance, for instance:**
  - a. **Past due mortgage statement.**
  - b. **Past due rent letter from landlord or eviction notice.**
  - c. **Past due basic utilities (electric, gas, and water).**
2. **Proof of qualifying event causing the financial need, for instance:**
  - a. **Doctor's Note / Leave documentation.**
  - b. **Fire/police report.**
  - c. **Layoff/separation notice.**

***ORIGINAL documents must be provided wherever available.***

***Other documentation may be required to complete the application.  
This list is in no way a comprehensive list of documents required.***

***NOTE: The Share Fund does not cover car repair, replacement or car insurance or loan, phone, Internet, cable, credit card bills, daycare, student loans, tuition, deductibles, medical expenses, insurance bills, down payments or any type of loan.***