

Prepared by the Vice President for Academic Planning & Policy.  
This is a NEW Executive Policy.

E6.204 Student Financial Assistance Program

I. Introduction

This executive policy implements BOR policy related to the Student Financial Assistance Program at the University of Hawai'i. Separately, policy guidelines governing the substance of student financial assistance are contained in Board of Regents policy, Chapter 6.

II. Objectives

The purposes of this policy are to establish and promulgate procedures for campuses to implement the Student Financial Assistance Program in keeping with Board policy. The objectives are to establish guidelines governing the policy considerations outlined in BOR policy, Chapter 6:

- A. The appropriate share of tuition revenues that should be devoted to financial assistance;
- B. The appropriate share of financial assistance for need-based and non-need-based awards;
- C. The appropriate share of financial assistance earmarked for Hawai'i residents;
- D. The appropriate share of financial assistance earmarked for undergraduates;
- E. The extent to which shares should vary by campus, based on mission and programs.

### III. Policy Guidelines

- A. Consistent with Board of Regents policy, campuses use a portion of their tuition revenues to provide financial assistance to students.
- B. The campuses are authorized to use tuition revenues to provide the following awards pursuant to BOR policy: UH Opportunity Grants, UH Achievement Scholarships, UH International Scholarships, UH Pacific Islander Scholarships, and certain tuition exemptions (waivers).
- C. The share of UH tuition revenues that may be allocated to student financial assistance shall vary by institutional type:
  1. UH Mānoa, UH Hilo, and UH West O‘ahu will allocate *15 percent* of their total tuition revenues charged in the prior academic year to student financial assistance.
  2. The Community Colleges will allocate *11 percent* of their total tuition revenues charged in the prior academic year to student financial assistance by 2012 (the allocation will increase from 9 percent in 2006-07 to 11 percent in 2011-2012 as shown in the attached spreadsheet).
- D. The share of UH tuition revenues allocated to need-based and non-need-based student financial assistance shall vary by institutional type:
  1. UH Mānoa shall allocate a minimum of *50 percent* of its student financial assistance (7.5 percent of its total tuition revenues) to need-based aid in the form of UH Opportunity Grants and a maximum of *50 percent* of its student financial assistance (7.5 percent of its total tuition revenues) to aid in the form of UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships.
  2. UH Hilo and UH West O‘ahu shall allocate a minimum of *60 percent* of their student financial assistance (9 percent of their total tuition revenues) to need-based aid in the form of UH Opportunity Grants and a maximum of *40 percent* of their student financial assistance (6 percent of their total tuition revenues) to aid in the form of UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships.
  3. The community colleges shall allocate a minimum of *80 percent* of their student financial assistance (8.8 percent of their total tuition revenues by the year 2012) to need-based aid in the form of UH Opportunity Grants and a maximum of *20 percent* of their student

financial assistance (2.2 percent of their total tuition revenues by the year 2012) to aid in the form of UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships.

4. Tuition assistance that is provided as a function or benefit of employment is not included in the foregoing amounts (i.e., such assistance may be above and beyond the amounts stipulated).
5. Chancellors are to determine the appropriate distribution of funding among the UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships in consultation with faculty and student bodies. Pacific Islands students who enroll before Fall 2007 will be allowed to continue paying resident tuition (per prior policy) as long as they maintain their eligibility and remain continuously enrolled in their current degree or program. The Office of the President updates and distributes the list of eligible Pacific Island jurisdictions.

The allocation of the revenues to need-based aid and other aid will be implemented between 2007-08 and 2012-2013 as shown in the attachment.

- E. UH Opportunity Grants may be awarded to residents or non-residents, undergraduate, graduate, or post-baccalaureate students in a teacher-preparation program, based on need. The maximum share of the total amount of financial assistance available for Opportunity Grants to non-residents is *30 percent* at the baccalaureate campuses (2.25 percent of total tuition revenues at UH Manoa; 2.7 percent of total tuition revenues at UH Hilo and UH West Oahu) and *15 percent* at the community colleges (1.32 percent of total tuition revenues), in keeping with BOR policy on campus ceilings for non-resident enrollment (BOR 5-11, b. 7). Eligibility for need-based aid is determined according to federal financial aid guidelines, but Chancellors are given the latitude to adjust the determination of need in special cases.
- F. The share of UH tuition revenues that shall be awarded for non-need-based assistance in the form of UH Achievement Scholarships may be awarded to residents or non-residents, undergraduate, graduate, or post-baccalaureate students in a teacher-preparation program. In all cases where there are equally qualified candidates, preference will go to resident students. Campuses may create UH Achievement Scholarships in keeping with their mission and program priorities.
- G. The share of UH tuition revenues that shall be awarded to undergraduates and the share that shall be awarded to graduate students shall be determined by the Chancellor in keeping with the mission and program priorities of the campus.

- H. The extent to which grants or scholarships are available for summer session or continuing education programs is delegated to the Chancellors.
- I. Students may receive more than one source of financial assistance. If, however, they receive need-based aid, their total award must be coordinated by the campus financial aid office.

#### IV. Reporting

The President shall provide a report to the BOR each year by October 1 that lists the dollar amounts paid and the number of students assisted by each of the grants or scholarships awarded (by educational level and resident status).

Tuition Assistance Allocations, 2006–07 through 2012–13 (Estimates based on Projected Enrollment & Revenues) Page 5 of 5  
\$ in Thousands

	2006–07	2007–08	2008–09	2009–10	2010–11	2011–12	2012–13
<b>UHM</b>							
% of Tuition Revenues of Prior Year		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
% Need-based Aid		5.3%	6.0%	6.8%	7.5%	7.5%	7.5%
% Non-need-based Aid		9.8%	9.0%	8.3%	7.5%	7.5%	7.5%
Maximum Projected Tuition Revenues *	\$133,502	\$158,710	\$185,306	\$209,790	\$233,985	\$258,450	\$258,451
NRTDs	\$22,179	\$26,194	\$30,202	\$34,218	\$38,222	\$42,235	\$46,670
MPR Adjusted for NRTDs	\$111,323	\$132,516	\$155,105	\$175,572	\$195,763	\$216,214	\$211,781
Minimum Need-based Aid		\$5,844	\$7,951	\$10,470	\$13,168	\$14,682	\$16,216
Maximum Non-need-based Aid		\$10,854	\$11,926	\$12,796	\$13,168	\$14,682	\$16,216
<b>UHH</b>							
% of Tuition Revenues of Prior Year		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
% Need-based Aid		8%	8%	9%	9%	9%	9%
% Non-need-based Aid		8%	7%	6%	6%	6%	6%
Maximum Projected Tuition Revenues *	\$14,665	\$17,609	\$20,435	\$23,339	\$26,201	\$29,107	\$29,108
NRTDs	\$4,611	\$5,340	\$6,072	\$6,800	\$7,528	\$8,258	\$9,059
MPR Adjusted for NRTDs	\$10,054	\$12,269	\$14,363	\$16,539	\$18,673	\$20,849	\$20,049
Minimum Need-based Aid		\$754	\$1,012	\$1,293	\$1,488	\$1,681	\$1,876
Maximum Non-need-based Aid		\$754	\$828	\$862	\$992	\$1,120	\$1,251
<b>UHWO</b>							
% of Tuition Revenues of Prior Year		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
% Need-based Aid		10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
% Non-need-based Aid		4.5%	4.5%	4.5%	4.5%	4.5%	4.5%
Maximum Projected Tuition Revenues *	\$1,892	\$2,248	\$2,617	\$2,989	\$3,377	\$3,767	\$3,768
NRTDs	\$277	\$321	\$364	\$408	\$452	\$496	\$544
MPR Adjusted for NRTDs	\$1,615	\$1,928	\$2,253	\$2,581	\$2,925	\$3,271	\$3,224
Minimum Need-based Aid		\$170	\$202	\$237	\$271	\$307	\$343
Maximum Non-need-based Aid		\$73	\$87	\$101	\$116	\$132	\$147
<b>CC</b>							
% of Tuition Revenues of Prior Year		9.0%	10.0%	10.0%	11.0%	11.0%	11.0%
% Need-based Aid		7.2%	8.0%	8.0%	8.8%	8.8%	8.8%
% Non-need-based Aid		1.8%	2.0%	2.0%	2.2%	2.2%	2.2%
Maximum Projected Tuition Revenues *	\$34,476	\$38,003	\$42,205	\$46,258	\$50,524	\$54,860	\$54,861
NRTDs	\$4,410	\$4,533	\$4,674	\$4,814	\$4,973	\$5,132	\$5,296
MPR Adjusted for NRTDs	\$30,067	\$33,470	\$37,531	\$41,444	\$45,552	\$49,728	\$49,565
Minimum Need-based Aid		\$2,165	\$2,678	\$3,002	\$3,647	\$4,009	\$4,376
Maximum Non-need-based Aid		\$541	\$669	\$751	\$912	\$1,002	\$1,094
System Need-based Aid		\$8,933	\$11,843	\$15,001	\$18,574	\$20,679	\$22,812

\* Note: The Maximum Projected Tuition Revenues are projected by the UH Budget Office and include all students normally given non-resident exemptions as paying full non-resident tuition. Thus, the Maximum Projected Tuition Revenues (MPR) Adjusted for NRTDs is the amount projected to be generated assuming the NRTDs are awarded.