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Academic Affairs and the Vice President for Student Affairs &
University/Community Relations
This is REVISED Executive Policy.

Executive Policy - Administration

May 2011

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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 guidelines 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 types of financial assistance to be awarded and paid to students;
- B. The appropriate share of tuition revenues that should be devoted to financial assistance;
- C. The appropriate share of financial assistance for need-based and non-need-based awards;
- D. The appropriate share of financial assistance earmarked for Hawai'i residents;
- E. The appropriate share of financial assistance earmarked for undergraduates;

F. 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.
1. UH Opportunity Grants - are need-based grants intended to protect the access of low-income students to higher education.

(a) Eligibility.

To be eligible for an Opportunity Grant, an individual must:

(i) Be a classified new or continuing, full-time or part time, resident or non-resident, undergraduate or graduate or post-baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools.

(ii) Complete the Free Application for Federal Student Aid (FAFSA).

(iii) Continuing students must be making satisfactory academic progress, per federal guidelines, in any particular certificate or degree program.

(b) Length of Grant

Grants shall be awarded for a regular academic year or a semester thereof, per federal financial aid guidelines.

(c) Amount of Grant

The total value of this grant should not exceed the difference between the cost of attendance, which includes the cost of tuition and fees, books and supplies, housing, meals, personal costs and transportation, and the expected family contribution, after eligible Federal grant is applied. The authority to determine exceptions to the Federal Financial Aid guidelines for need-based aid is delegated to the chancellors or their designee(s).

2. UH Achievement Scholarships - are based on merit, service and other achievements that reflect University or campus missions. These would include the Regents and Presidential Scholarship Program, which has its implementation guidelines in BOR Policy, Chapter 6.

(a) Eligibility

(i) To be eligible for an Achievement Scholarship, an individual must be a classified new or continuing, full-time or part-time, resident or non-resident, undergraduate or graduate or post-baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools. In all cases where there are equally qualified candidates, preference will be given to Hawai'i residents.

(ii) The responsibility for setting additional requirements and guidelines is delegated to the chancellors or their designee(s), who may increase or expand criteria based on the mission of their campuses and programs.

(b) Length of Scholarship:

Scholarships shall be awarded for a regular academic year or a semester thereof. A student remains eligible while pursuing any particular certificate or degree program, as long as the student makes satisfactory academic progress.

(c) Amount of Scholarship

The total value of this scholarship is determined by the chancellors or their designee(s) based on the mission of their campuses and programs.

3. UH International Student Scholarship - are intended to encourage highly qualified international students to attend and complete a degree or certificate at University of Hawai'i campuses.

(a) Purpose

The purpose of the International Student Scholarship Program is to support the University of Hawai'i's recognized mission to provide relevant education and training to those who will assume positions of leadership and service in the Pacific and Asia region and around the world.

(b) Eligibility:

(i) To be eligible for an International Student Scholarship, an individual must be a classified new or continuing, full-time, undergraduate or graduate student in a non-immigrant status at any campus or participate in a recognized pre-admission program maintained by various professional schools.

(ii) Award distribution is provided to students:

(a) From the Asia/Pacific region, excluding those eligible for Pacific Islander Scholarships described below.

(b) Studying the Asia/Pacific region, or

(c) Who provide international diversity, in keeping with the campus mission.

(c) Amount and Length of Scholarship

The total value of this scholarship is determined by the chancellors based on the mission of their campuses and programs. The amount and length of the award may vary; the maximum award is the difference between non-resident tuition and 150 per cent of resident tuition, unless an exchange agreement exists with another international institution of higher education.

4. UH International Exchange Scholarships - are based on agreements made by a campus, several campuses, or the UH System with an international institution. They are fundamentally different from the UH International Student Scholarships in that they do not apply to students who are seeking a degree or certificate.

(a) Student exchange agreements are reciprocal in nature, i.e., UH students register and pay tuition to their UH home campus and then attend a partner institution on a waived tuition basis. In turn, students from partner institutions pay their home institution and attend the UH campus tuition-free.

(b) System exchange agreements are basic agreements only that do not commit any campus resources.

(c) Authority is delegated to the chancellors or their designee(s) to develop mutually beneficial international exchange agreements per campus mission and goals.

5. UH Pacific Islander Scholarships - may be given to citizens of certain Pacific Island jurisdictions to augment their total financial assistance package.

(a) Background

The University is committed to providing relevant education and training to those in the Pacific who will assume positions of leadership, responsibility and service in the Pacific region. Thus, students from this region may be eligible to be charged a subsidized rate of 150 percent of resident tuition. The Office of the President updates and distributes the list of eligible Pacific Island jurisdictions.

(b) Eligibility

To be eligible for a Pacific Islander scholarship, an individual must be a citizen of one of the eligible Pacific Island jurisdictions. He or she must be a classified new or continuing, full-time or part-time, undergraduate or graduate or post baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools.

(c) Amount and Length of Scholarship

The amount and length of the scholarship is left to the discretion of the chancellors or their designee(s) based on campus mission and goals.

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. The share of UH tuition revenues allocated to Hawai'i residents and nonresidents toward student financial assistance shall vary by institutional type:
 1. UH Opportunity Grants -- The maximum share of the total amount of financial assistance available for UH Opportunity Grants to non-residents is 30 percent at the baccalaureate campuses and 15 percent at the community colleges, 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.
 2. UH Achievement Scholarships - In all cases where there are equally qualified candidates, preference will go to Hawai'i resident students. Campuses may create UH Achievement Scholarships in keeping with their mission and program priorities.
- F. 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.

- G. The extent to which grants or scholarships are available for summer session or continuing education programs is delegated to the Chancellors.
- H. 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 Chancellor shall provide a report to the President 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).