Maryland Higher Education Commission

Finance Policy Committee
Meeting Agenda

1:30 P.M.
Thursday, May 9, 2002
Anne Arundel Community College
Cade Building, Room 224
Arnold, Maryland 21146

MARYLAND HIGHER EDUCATION COMMISSION

John J. Oliver, Jr., Chairman

Dorothy Dixon Chaney

Edward O. Clarke, Jr.

Micah Coleman

Anne Osborn Emery

John L. Green

George S. Malouf, Jr.

David S. Oros

R. Kathleen Perini

Charles B. Saunders, Jr.

Donald J. Slowinski, Sr.

Richard P. Streett, Jr.

Karen R. Johnson, J.D.
Secretary of Higher Education

MARYLAND HIGHER EDUCATION COMMISSION
FINANCE POLICY

Richard P. Streett, Jr., Chair

R. Kathleen Perini, Vice Chair

George S. Malouf, Jr.

David S. Oros

Donald J. Slowinski, Sr.

Janice B. Doyle
Assistant Secretary for Finance Policy

MARYLAND HIGHER EDUCATION COMMISSION
FINANCE POLICY COMMITTEE

AGENDA

TIME: 1:30
Thursday
May 9, 2002

PLACE: Anne Arundel Community College
Cade Building, Room 224
Arnold, Maryland

	Page	Action Item
Call to Order		
Approval of the October 11, 2001 Minutes	1	*
FY 2004 Capital Budget Priorities	7	*
Name Change for the State Scholarship Administration	11	*
Guidelines for the General Rules and Definitions for the Student Financial Assistance Programs	13	*
Guidelines for the Loan Assistance Repayment Program	27	*
Guidelines for the Maryland HOPE, the Maryland Teacher and the Maryland Science and Technology Scholarship Programs	37	*
Guidelines for the Edward T. Conroy Scholarship	77	*
Guidelines for the Developmental Disabilities & Mental Health Workforce Tuition Assistance Program	87	*
Guidelines for the Educational Excellence Award Program	97	*
Guidelines for the Graduate and Professional Scholarship Program	115	*

The Maryland Higher Education Commission is committed to ensuring that individuals with disabilities are able to fully participate in and benefit from the Commission's public meetings, programs, and services. Anyone planning to attend a meeting of the Commission who wishes to receive auxiliary aids, services, or accommodations should contact Susan Taylor at 410-260-4539 or 1-800-735-2258 (TTY/Voice) by Monday, May 6, 2002.

MARYLAND HIGHER EDUCATION COMMISSION
16 Francis Street
Annapolis, Maryland 21401

Finance Policy Committee
Minutes of Meeting
October 11, 2001

The Finance Policy Committee met on Thursday, October 11, at the Jeffrey Building, 16 Francis Street, Annapolis Maryland. Commission members present were: Dr. Richard P. Streett, Jr., Chair; R. Kathleen Perini, Vice Chair; and Micah Coleman.

Staff members present were: Karen R. Johnson, Secretary; Janice Doyle, Assistant Secretary; Dr. John A. Sabatini, Jr., Assistant Secretary; Pace McConkie; Monica Randall; Geoffrey Newman; David Beard; Cathy Tidwell; and Jeffrey Cann.

CALL TO ORDER

Commissioner Streett called the meeting to order at 2:15 p.m.

APPROVAL OF MINUTES

The Commissioners reviewed the Finance Policy Committee meeting minutes from the September 13, 2001 meeting and approved them with no corrections.

OPENING REMARKS

Ms. Karen Johnson, Secretary of Higher Education, welcomed the Committee members and others in attendance. She stated that higher education has been very fortunate and has benefited from significant increases in funding over the last few years. Between FY 2001 and FY 2002, the State increased operating funds 15 percent and funded many capital projects. She cited an extraordinary surplus in funds as an explanation for these increases. However, she warned that because of the economic slowdown, the State will not see record surpluses this year and may not over the next several years.

Secretary Johnson said that current revenue estimates are lower than expected and that some degree of caution should be exercised as budget requests are submitted to the Governor. She said that she remains cautiously optimistic about our budget recommendations and realizes that there are many needs. The Commission staff is recommending a 15 percent increase in operating funds and this includes enhancements for Maryland's Historically Black Institutions (HBI) pursuant to the Office for Civil Rights (OCR) Partnership Agreement.

FY 2003 CONSOLIDATED OPERATING BUDGET

Ms. Janice Doyle, Assistant Secretary for Finance Policy, presented an overview of the staff's operating budget recommendations. She stated that Maryland statute requires the Commission to present a consolidated operating budget request to the Governor and the General Assembly. The operating budget includes recommended funding levels for higher education that are appropriate to achieve the goals established in the Maryland State Plan for Higher Education. In addition, staff reviewed the budget requests from the University System of Maryland and Morgan State University within the context of the State of Maryland's Partnership Agreement with the U.S. Department of Education, Office for Civil Rights (OCR).

University System of Maryland

Ms. Doyle stated that staff recommends a general fund appropriation of $978.4 million in FY 2003; a 12 percent increase over the FY 2002 appropriation. All initiatives submitted by the system are consistent with the State Plan. Overall, USM's general fund request is 93 percent of the amount recommended by the operating funding guidelines. Additionally, the staff recommends an additional $6 million to fund items related to the OCR agreement. These additional funds will be used to enhance the State's HBIs.

Morgan State University

Ms. Doyle stated that Morgan requested a general fund appropriation of $61.8 million. Staff recommends a general fund appropriation of $57.1 million. This recommendation is consistent with operating funding guidelines and will provide the institution with funds to support cost of living increases and institutional enhancements.

St. Mary's College of Maryland

Ms. Doyle stated that the college receives State appropriations through a funding formula. St. Mary's requested a general fund appropriation of $18.3 million. This request included additional funding for institutional enhancements. Staff recommends a general fund appropriation of $16.6 million; a 12 percent increase over the FY 2002 appropriation. This amount includes funds provided through the statutory formula and an additional $1.1 million for enhancements to accommodate greater than anticipated enrollment growth.

Baltimore City Community College

Ms. Doyle stated that Baltimore City Community College (BCCC) receives State appropriations through a funding formula. Staff recommends supporting BCCC's State grant plus additional aid for their English for Speakers of Other Languages (ESOL) program for a total general fund recommendation of $35.7 million.

Community Colleges

Ms. Doyle stated that the community colleges receive State appropriations through the Cade funding formula. Based on estimated FY 2001 FTES, formula aid to the community colleges is projected to increase by $21.9 million in FY 2003. The estimated formula is $172.9 million. In addition, the community colleges receive State general funds for fringe benefits and several unique programs. The Commission requested $30.3 million in FY 2003 for retirement/fringe benefits, statewide programs, ESOL, Garrett/West Virginia Reciprocity Agreement, unrestricted grants, Somerset reciprocity grant, and the Innovative partnership for technology. Staff recommends a general fund appropriation of $202.9 million for programs to support the State's community colleges.

Aid to the Independent Institutions

Ms. Doyle stated that the State provides funding to the independent colleges and universities through the statutory formula. Staff recommends a $52.1 million for Maryland's independent colleges and universities through the Sellinger program. Dr. J. Elizabeth Garraway, President of the Maryland Independent College and University Association, expressed concern about the impact of including Columbia Union in the formula. Dr. Garraway also stated that Mount St. Mary's and Goucher have higher enrollments than reported in the estimated request.

Regional Higher Education Centers

Ms. Doyle reported that the staff recommends a general fund appropriation of $1.4 million for the Regional Higher Education Centers. She encouraged the centers to seek support from other sources such as local area businesses and county governments.

Maryland Higher Education Commission

Ms. Doyle stated that for FY 2003, the Commission is requesting a general fund appropriation of $398.3 million for FY 2003. This includes $7.4 million for general administration; $30 million for educational grants; $105 million for financial aid; $203.5 million for the community colleges and $52.6 million for aid to the independent colleges and universities.

Ms. Doyle reported that the Commission staff recommends that the Finance Policy Commission approve the FY 2003 Consolidated Operating Budget of $1.5 billion and forward the recommendation to the Commission. Commissioner Street moved for approval of the recommendation. Commissioner Perini seconded the motion and the motion carried unanimously.

FY 2003 CONSOLIDATED CAPITAL BUDGET

Ms. Cathy Tidwell, Finance Policy Analyst, presented the FY 2003 consolidated capital budget request for Maryland's higher education institutions. The requests totaled $266.4 million. Ms. Tidwell stated that staff recommends a consolidated capital budget of $177.3 million. The decision to recommend deferment or reduction of project funding requests was based on a number of considerations including: Commission priority

categories; the State's five-year Capital Improvement Program; the State's debt capacity; and the OCR Partnership agreement.

The University System of Maryland

The University System of Maryland's requests totaled $99.1 million for 31 projects. Commission staff recommends $74.2 million to fund 28 projects. Funding for three projects were recommended for deferment: Towson – construction funds for the Fine Arts Building; University of Maryland Eastern Shore – planning funds for the construction of the Engineering, Aviation, Computer and Mathematical Sciences Building and; the University of Maryland Center for Environmental Sciences – construction funds for the addition to Truitt Laboratory.

Morgan State University

Morgan State University requested $85.7 million to support nine projects. The Commission staff recommends $30.1 million to fund six projects. Funding for the following projects were recommended for deferment or reduction: construction funds for the new library; campus-wide utilities upgrade; New Center for Built Environmental Studies; and the New Hospitality Management Complex.

St. Mary's College of Maryland

St. Mary's College of Maryland requested $6.9 million for five projects. Staff recommends supporting the funding request of $6.9 million for FY 2003.

Baltimore City Community College

Baltimore City Community College requested $17.2 million for phase two of renovations to the main building. Staff recommends supporting the funding request of $17.2 million for FY 2003.

Community Colleges

The Maryland Association of Community Colleges requested $46.8 million for 41 projects. The staff recommended $39.3 million to fund thirty-six (36) projects. Staff recommends deferment of the following projects: Allegany – design funds for the renovation of the physical education building; Carroll – equipment funds for the nursing and allied health facility; Cecil – design funds for the renovation of the physical education building; Howard – construction funds for the athletic field and nature trail; and Montgomery, Takoma Park- construction funds for the pedestrian bridge. In addition, staff recommended a decrease of $330,000 to the Center for Applied Learning and Technology at Anne Arundel.

Eastern Shore Higher Education Center

The Eastern Shore Higher Education Center requested $650,000 in equipment funds for the new higher education facility. The staff recommends supporting this request.

Independent Institutions

The Maryland Independent Colleges and Universities Association requested $10 million for four projects. The staff reviewed the capital project applications and visited the institutions requesting funds. Based on their review, the staff recommends $9 million.

Ms. Tidwell asked the Committee to approve the staff's recommendations of $177.3 million and to forward this recommendation to the full Commission. Commissioner Streett asked if there were comments from representatives with regard to the capital budget recommendations.

Dr. J. Elizabeth Garraway, President of the Maryland Independent College and University Association testified on the FY 2003 consolidated capital budget request for the independent institutions. She stated that there is a critical need for these capital projects for the independent colleges. Dr. Garraway added that MICUA had scrutinized these requests from the institutions and that the original request was $21 million. MICUA and the presidents worked to develop a final request of $10 million.

Several representatives from the Community Colleges testified on their capital budget requests. Elissa Klein, Maryland Association of Community Colleges, spoke on behalf of the community colleges. She reported that Anne Arundel accepts the staff's recommendation to reduce funds for the Center for Applied Learning and Technology by $330,000. She also stated that this project has received support from the local government.

Mr. Frederick E. Nunley, Prince George's Community College, spoke on behalf of Prince George's Community College. He stated that he understood the recent fiscal constraints, but appealed to the Committee to reconsider their request for funds to design the new Technology Building. Mr. Nunley provided a historical overview of the project citing that design funds had been deferred in FY 2000. Furthermore, he stated that the Technology Building is the centerpiece for future educational programs at the college. The number of students enrolled in technology fields has increased 44 percent over the last several years and the college has experienced a significant increase in enrollment in computer technology.

Ms. Doyle stated that all of the requests were for excellent projects. She stated that it was difficult to reduce the requests. Since the technology building is for new construction, it was given a lower priority than other projects.

Commissioner Perini expressed concern about not including the design funds for this new building. She stated that if it were possible to provide design funds for this building, then those funds should be included.

Mr. Bill Campbell and Mr. Clarence Porter, Montgomery College, spoke on behalf of Montgomery Community College, Takoma Park. They both appealed to the Committee to consider their concerns about the lack of funding for the pedestrian bridge that would link an off-campus building to the main complex at the Takoma Park campus. Their

main concern was for the safety of the students. They also reported that the project is ready for construction; 80 percent of the design work has been completed and approved.

Dr. Mary Ellen Duncan, President of Howard County Community College, addressed the Committee concerning the need for improved athletic fields and replacement of the nature trail. She stated that the college has received numerous complaints from parents and students about the poor condition of the athletic fields. She said that this project has been delayed and deferred for many years. She added that the nature trail includes an outside laboratory for the science department.

Ms. Mona Fritz, Dean of Administrative Services at Allegany College spoke on behalf of Allegany. She stated that these funds would be used to renovate the physical education building.

Commissioner Coleman recommended that the Committee approve the FY 2003 consolidated budget recommendation of $177.3 million for capital projects with the understanding that the staff examine alternative methods to fund Prince George's technology building. He stated that staff should address this issue at the full commission meeting in November. Chairman Streett seconded the motion. The motion carried unanimously.

Commissioner Perini stated that it was clear that many important capital projects had been recommended for deferral. She recommended that staff work to find additional funds or shift funds. Chairman Streett agreed that many projects were important but pointed out that the Commission has been directed to do business differently than had been done in the past couple of years because of the extenuating circumstances. He added that the Commission is making every effort to be fair to everyone.

Chairman Streett stated, for the record that he would like to make a motion that the Maryland Higher Education Commission act as advocates for the higher education. All capital projects that had been recommended for deferral were meritorious. In addition, the Commission should lobby for these projects if funds become available. Commissioner Coleman seconded the motion and the motion carried unanimously.

ADJOURNMENT

The Finance Policy meeting adjourned at 4:00 pm.

MEMORANDUM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: David S. Beard

SUBJECT: FY 2004 Capital Budget Priorities

The statute creating the Maryland Higher Education Commission requires the Commission to develop guidelines to assess the adequacy of capital funding and make annual recommendations on the appropriate level of funding for higher education capital projects. As a result, the Commission annually establishes capital budget priorities, which provide a uniform framework within which individual capital project requests are recommended.

The capital budget priorities for fiscal 2004 remain unchanged from last year's priorities. Capital projects are ranked first by the Commission's eight priority categories and then further prioritized within each category by the types of facilities. Upon approval, the attached set of priorities will guide Commission staff in the evaluation of the FY 2004 capital budget requests and ultimately the Commission's annual capital budget recommendations to the Governor.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the FY 2004 Capital Budget Priorities for both two-year and four-year institutions and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410) 260-4500 • (800) 974-0203 • FAX (410) 974 - 3513 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION
CAPITAL BUDGET PRIORITIES
FY 2004

Each year the Maryland Higher Education Commission approves a set of priorities to guide in the evaluation of capital budget requests. All capital projects are placed into one of the priority categories. The Capital Budget Priority Categories provide the basic framework for evaluating and recommending projects. Under the priorities, projects are ranked first by the priority category and further by types of facilities.

Project Priority Categories ▼	Types of Facilities				
	Academic Facilities	Research Facilities	Support Facilities[1]	Regional Higher Education Centers	Continuing Education Facilities
I) Life Safety II) Legal Mandates III) Project Completions IV) Renovation or Renewal of Existing Projects V) Improvements to Utility & Basic Support Services VI) New Construction VII) Site Improvements VIII) Land Acquisition	Facilities that support the instructional programs essential to the approved role and mission of the institution.	Research facilities consistent with the approved role and mission of the institution.	Administration, physical plant space, and other support services.	Facilities that include participation by more than one institution and offer an array of programs at multiple degree levels.	Facilities that address workforce training needs or offer programs that lead to certification in a workforce skill.

[1] To the extent possible, institutions are encouraged to seek non-public financing for revenue-generating facilities such as student housing, parking, bookstores, athletic facilities, and dining services.

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Name Change for the State Scholarship Administration

Senate Bill 453 was passed during the 2002 Maryland Legislative Session. This legislation changed the name of the State Scholarship Administration to the Office of Student Financial Assistance. Upon approval by the Commission, the Office of Student Financial Assistance will review all of the guidelines for all of the programs and remove all references to the State Scholarship Administration and replace them with the name of the Office of Student Financial Assistance.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the name change in the guidelines for all State grants and scholarships and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 - 2258

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the General Rules and Definitions for the Student Financial Assistance Programs

House Bill 399 was passed during the 2002 Maryland Legislative Session. This legislation allows a student to hold any state grant or scholarship issued under Title 18 with any other issued under this Title as long as all eligibility requirements are met for each program; and, the total of all scholarships and grants does not exceed the student's total cost of education as certified by the institution that the student is attending or the equivalent of annual expenses of a full-time resident undergraduate at a four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

Once this change is accepted, the OSFA will review all of the guidelines for all of the programs and remove all references to the limitations on multiple awards and replace them with the wording in section G. of these guidelines.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Rules and Definitions for the Student Financial Assistance Programs and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 - 2258

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR

STUDENT FINANCIAL ASSISTANCE PROGRAMS

APPROVED: JUNE 12, 1997
REVISED AND SUBMITTED: JUNE 2002

APPROVED: June 12, 1997
REVISED AND SUBMITTED: June 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for Student Financial Assistance Programs

AUTHORITY

These guidelines are provided to establish general rules and definitions for all student assistance programs administered by the ~~State Scholarship Administration~~ Office of Student Financial Assistance Title 18 of the Education Article, Annotated Code of Maryland and to clarify the intent of pertinent federal general provisions governing student assistance program administration under federal Title IV in the Higher Education Act of 1965, as amended (20 U.S.C. §1070a-1-6).

A. PURPOSE

The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall have the following purposes:

1. to administer the scholarship and tuition assistance programs under Title 18;

2. to issue and disseminate public information about these scholarship programs;

3. to regulate the form and submission of applications for scholarship and tuition assistance under this title;
4. to analyze the financial need of each applicant for a scholarship for which need is a consideration, utilizing a uniform method;

5. to establish criteria for selection of recipients according to statutory requirements; and

6. to administer federal programs of scholarships or grants to students or institutions.

B. DEFINITIONS

The following terms have the meanings indicated.

1. "Academic year" means a period of time in which a full-time student is expected to complete the eligible institution's requirement of academic progress of at least:

   a. Two semesters, two trimesters, or three quarters; or
   b. Nine hundred clock hours.

2. ~~"Administration"~~ "Office" or ~~"SSA"~~ "OSFA" means the administrative department of the Maryland Higher Education Commission which manages the State ~~Scholarship Administration~~ financial aid programs.

3. "Clock hour" means the equivalent of at least 50 minutes in a:

   a. Class, lecture or recitation; or
   b. Faculty supervised laboratory, shop training, or internship.

4. "Commission" means the Maryland Higher Education Commission.

5. "Competitive examination" means the SAT I or the ACT .

6. "Cost of attendance" means reasonable educational expenses as calculated by the ~~Administration~~ OFSA which may include tuition and fees, books and supplies, room and board or living expenses, miscellaneous personal expenses, and transportation costs for the academic period of aid application.

7. "Dependent student" means, in general, a student who is financially dependent upon his or her parents or other individuals. For State need-based scholarship programs, the official definition for dependent student shall be the one listed under 34 CFR Part 668, Section 668.2.

8. "Eligible institution" means an institution of post-secondary education in this State that possesses a Certificate of Approval from the Commission.

9. "Eligible noncitizen" means a person who is not a citizen of the United States but who meets the criteria specified under 34 CFR Part 668, Section 668.33 (a) (2).

10. "Eligible student" means any student enrolled or accepted for enrollment at an institution of postsecondary education, meeting the criteria established under the individual program requirements in Education Article, Title 18.

11. "Employment verification" means written documentation from an employer that a recipient of a grant or loan repayment assistance is performing work in a field which the recipient is required to perform as a condition of receiving the grant or loan repayment assistance.

12. "Enrolled" means the status of a student who has completed the registration requirements except for payment of tuition and fees at the institution that the student is attending.

13. "Executive Director" means the chief administrative officer of the ~~Administration~~ OSFA appointed by the State Secretary of Higher Education.

14. "Expected family contribution" means the amount an applicant and his or her spouse and family are expected to contribute toward the applicant's cost of attendance as described in Part F of Title IV of the Higher Education Act which is hereby incorporated by reference.

15. "Financial need" means the difference between the applicant's cost of attendance and the applicant's expected family contribution.

16. "Fiscal year" means the period from July 1 through June 30 each year.

17. "Full-time" means an academic workload which is equal to or exceeds one of the following minimum requirements:

    a. Twelve semester or trimester hours per semester or trimester, twelve quarter hours per quarter or eighteen clock hours per week of undergraduate level coursework; or

    b. Nine semester hours of graduate level coursework, carried by a student during a standard term or semester as defined by the eligible postsecondary education institution in which the student is enrolled.

18. "Full-time employment" means a minimum of 35 hours per week of regularly scheduled employment.

19. "Full-time equivalency" means enrollment in classroom, lab, clinic, practicum, or other academic courses which equal or exceed 180 clock hours per semester.

20. "Grade point average" means the average of the points assigned to a scholarship applicant's grades received in prior secondary and/or postsecondary educational courses.

21. "Graduate student" means a student who is enrolled in an academic program of study above the baccalaureate level leading to a post-baccalaureate certificate, certificate of advanced graduate study, master's degree or doctoral degree in an institution of higher education.

22. "Guaranteed promissory note" means a written contract obligating a recipient to repay the funds received if the recipient does not fulfill the service obligation which was a condition of the recipient's scholarship or grant award. The contract requires that a second party agree to repay the funds if the recipient neither performs the service obligation nor repays the funds.

23. "Guardian" means a person appointed as such by a court order recognized under the law of the State of Maryland.

24. "Independent student" means in general, a self-supporting student who is not financially dependent on his or her parents or any other individual. For State need-based programs, the official definition of independent student shall be the one listed under 34 CFR Part 668, Section 668.2.

25. "Initial award" means the first offer of financial assistance extended to an eligible applicant by the ~~State Scholarship Administration~~ Office of Student Financial Assistance.

26. "Legislative district" means one of the legally established Maryland election districts.

27. "Mandatory fees" means the required charges, in addition to tuition, assessed by a institution of postsecondary education to its students during each semester or other period of enrollment specified by the institution.

28. "Maryland resident" means any student meeting the criteria of the ~~State Scholarship Administration~~ Office of Student Financial Assistance listed under section D of this guideline.

29. "Matriculated status" means the student is admitted as a recognized candidate for an appropriate degree, diploma, or certificate at an eligible institution of post-secondary education.

30. "Merit rank" means a ranking system, based on the applicant's scores from either the SAT I or the ACT examination which is used to determine an applicant's priority for an Educational Assistance Grant.

31. "Out-of-state school" means an accredited institution of postsecondary education located in the District of Columbia or in a state other than Maryland.

32. "Parent" means a student's natural or adoptive mother or father or legal guardian appointed by the court who is directed by the court to use his or her own resources to support the student.

33. "Part-time" means an academic workload which is less than "full-time" as defined in B. 17 of this guideline and equivalent to at least 6 semester or trimester hours per semester or trimester, 6 quarter hours per quarter or 9 clock hours per week of undergraduate or graduate level coursework.

34. "Permanent residence" means a person's permanent place of abode, as defined in section D. 3.

35. "Professional student" means a student who is enrolled in an academic program of study above the baccalaureate level in an institution of higher education leading to a degree or certificate for becoming a practitioner in a field including, but not limited to, law, medicine, dentistry, pharmacy, or nursing.

36. "Promissory Note" means a written contract obligating a recipient to repay the funds if the recipient does not fulfill the service obligation which was a condition of the recipient's scholarship or grant award.

37. "Reciprocity" means an agreement between Maryland and designated states to exchange student assistance funds in support of Maryland students attending out-of-state schools and other students attending Maryland institutions of postsecondary education.

38. "Satisfactory academic progress" means a standard of minimum academic performance established by the institution of postsecondary education where the student is enrolled.

39. "Spouse" means a partner in a legally contracted marriage recognized under Maryland law.

40. "State" means the geographic area and political entity known as the State of Maryland.

41. "Student" means any person who has applied to attend, is attending or has attended an institution of postsecondary education.

42. "Support" means financial or material support, including gifts, services, trusts, and income or benefits derived from one's family.

43. "TFC rank" means a ranking system used to determine an applicant's priority for an Educational Assistance Grant based on the applicant's expected family contribution.

44. "Undergraduate" means a student who is enrolled in an academic program of study in an institution of higher education at or below the baccalaureate level

leading to either a certificate, nursing diploma, associate's degree or bachelor's degree.

45. "U. S. citizen" means one who under the Constitution and laws of the United States is a native-born or naturalized citizen of the United States of America.

46. "Verification" means the procedures implemented by the Administration to validate the eligibility of applicants for student assistance awarded based on financial need.

C. STUDENT APPLICANT ELIGIBILITY REQUIREMENTS

Eligibility for ~~Administration~~ OSFA programs varies by individual program. Unless otherwise stated in the individual program description, the following list of criteria is required for all ~~Administration~~ OSFA programs.

To qualify for ~~Administration~~ OSFA programs, the applicant shall:

1. maintain Maryland residence status as defined under section D of this guideline;

2. be enrolled or accepted for admission in an institution of postsecondary education or out-of-state school as defined in sections B. 8 and B. 31 of this guideline;

3. maintain the satisfactory academic progress standards of the institution of postsecondary education in which the student is enrolled;

4. complete an official application as required by the particular scholarship program.

D. MARYLAND RESIDENCY REQUIREMENTS

This policy applies to all ~~Administration~~ OSFA scholarship and grant programs which require Maryland residence as a condition of receiving financial assistance. This policy is not intended to displace, supersede or affect in any manner other definitions of residency used by any institution or agency for any other purpose and it applies only to Administration programs.

1. Required Period of Residency

   Applicants shall establish that they have been residents of the State of Maryland for the required time frame as specified below. The required time frames are based upon the type of institution the student will be attending and are for the period immediately preceding the first day of class for the first session in which the student would receive a State scholarship award.

a. Students enrolling in public four-year colleges and universities must have established Maryland residence for a period of 12 months preceding the first day of class for the first session in which the student would receive a State scholarship award.

b. Students enrolling in public community colleges must have established Maryland residence for a period of 3 months preceding the first day of class for the first session in which the student would receive a State scholarship award.

c. Students enrolling in independent colleges and universities must have established Maryland residence for a period of 12 months preceding the first day of class for the first session in which the student would receive a State scholarship award.

d. Students enrolling in private career schools must have established Maryland residence for a period of 3 months preceding the first day of class for the first session in which the student would receive a State scholarship award.

e. Students enrolling in out-of-state schools shall establish residency for a period of time equal to the required time frame for a comparable institution of postsecondary education within the State.

2. General Criteria

Recipients of Maryland State scholarships will be considered as Maryland residents if one of the following criteria are met:

a. the student is dependent upon a parent(s) or spouse who has maintained a permanent residence in Maryland for the required period of residency described in section D of this guideline.

b. the student is independent and has maintained a permanent residence in Maryland for the required period of residency described in section D of this guideline.

c. the student is a full-time active member of the Armed Forces of the United States who is stationed in the State of Maryland or whose home of residency is Maryland.

d. the student is a dependent spouse or dependent child of a full-time active member of the Armed Forces of the United States who is stationed in the State of Maryland or whose home of residency is Maryland.

3. Permanent Residence

In determining if permanent residence has been established in Maryland, the following criteria shall be taken into consideration. The applicable criteria must be met for the required period of residency as described in section D of this guideline. The criteria are as follows:

a. owns or rents and occupies living quarters in Maryland;

b. maintains within Maryland substantially all personal property;

c. pays Maryland income tax on all earned taxable income including all taxable income earned outside the State;

d. registers all owned motor vehicles in Maryland in accordance with Maryland law;

e. possesses a valid Maryland driver's license, if licensed, in accordance with Maryland law;

f. is registered to vote in Maryland, if registered to vote; and

g. receives no public assistance from a state other than the State of Maryland or from a city, county or municipal agency other than one in Maryland.

4. Appeal

A student may appeal a denial of Maryland residency under the appeal mechanism defined in section F of this guideline.

5. Change of Status

Maryland residency status is lost at any time that an independent student, or the parent or spouse through whom a dependent student has attained Maryland residency status, establishes a domicile outside the State. The student shall be considered an out-of-State student in the first academic term, trimester, or semester after the out-of-State move occurs.

E. PROFESSIONAL JUDGMENT

The Executive Director of the ~~State Scholarship Administration~~ Office of Student Financial Assistance or the Executive Director's designee may make necessary adjustments to a student's eligibility for a State scholarship award on the basis of adequate written documentation of extenuating circumstances-stances.

F. APPEAL PROCEDURES

1. Appeals of decisions of ineligibility or revocation of State scholarship awards are made to the Executive Director of the ~~State Scholarship Administration~~ Office of Student Financial Assistance. All appeals must:

   a. be in writing;

   b. be submitted within 30 days of notice of ineligibility or cancellation of award; and

   c. detail reasons and/or circumstances that would justify reversal of the original decision, including all appropriate documentation.

2. The Executive Director will review each case and make a decision based on the written materials submitted no later than forty-five (45) days after receiving the appeal. The student will be notified in writing of the Executive Director's decision. All decisions of the Executive Director are final.

G. HOLDING MULTIPLE STATE GRANTS AND SCHOLARSHIPS

A student may hold any State grant or scholarship issued under Title 18 with any other issued under this title as long as:

1. eligibility requirements are met for each scholarship and grant received; and

2. the total of all scholarships and grants doest not exceed:

   a. the student's total cost of education as certified by the institution the student is attending; and

   b. the equivalent annual expenses of a full-time resident undergraduate at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Loan Assistance Repayment Program

The Janet L. Hoffman Loan Assistance Repayment Program (LARP) provides assistance in repaying education loans for individuals who work in government and non-profit organizations providing professional service in fields in which there is a shortage of qualified practitioners to low income or underserved residents or areas of the State.

Under the current guidelines for the program, individuals apply for an award after they have received an undergraduate, graduate or professional degree from a college or university located in Maryland or a school of law, and obtained full-time employment with an eligible employer in the state.

The attached changes to the LARP guidelines establish a pilot program to provide an early commitment for a LARP award to students in their third year of law school. Based on information from staff and students at Maryland law schools, students are frequently recruited for a professional position as an attorney while still in their 3rd year of law school. The purpose of the change is to provide early notification of LARP awards to encourage these students to consider lower paying positions in the public sector.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Janet L. Hoffman Loan Assistance Repayment Program and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

JANET L. HOFFMAN LOAN ASSISTANCE REPAYMENT PROGRAM

APPROVED: OCTOBER 14, 1997
REVISED & SUBMITTED: JUNE 2002

APPROVED: October 14, 1997
REVISED & SUBMITTED: June 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the Janet L. Hoffman Loan Assistance Repayment Program

AUTHORITY

The Janet L. Hoffman Loan Assistance Repayment Program was enacted into law by the Maryland General Assembly in 1988 and amended in 1994. Under law (Annotated Code of Maryland - Education Article - 18-1501 through 18-1505), the ~~State Scholarship Administration~~ Office of Student Financial Assistance has the authority to establish regulations for the administration of the Program.

A. PURPOSE

The Janet L. Hoffman Loan Assistance Repayment Program is designed to attract qualified individuals to fields of employment in government and the non-profit sector, particularly those in which there are critical manpower shortages in the State and lower salaries than in the private sector. The program is established to help participants reduce the amount of indebtedness created by the cost of higher education through assisting in the repayment of educational loans.

B. ELIGIBILITY

To be eligible for repayment assistance, an individual must have received an undergraduate, graduate or professional degree from a college or university located in Maryland or a school of law. Applicants must have obtained full-time employment with an eligible employer in the State. Eligible employers are defined as the State, local governments, and organizations, institutions, associations, societies, and corporations that are tax exempt under 501(C)3 or (4) of the Internal Revenue Code of 1986, i.e., non-profits. Eligible employment does not include being employed as a judicial clerk in any court.

To be eligible for repayment assistance, an individual must not be in default on any higher education loan. Loans eligible for repayment assistance are any loans for undergraduate or graduate study obtained for tuition, educational expenses, or living expenses from a college, university government or commercial source.

To be eligible for repayment assistance, an individual's annual gross salary from eligible employment may not exceed $50,000. If the applicant is married, combined adjusted gross income may not exceed $110,000. Eligible income levels will be adjusted annually as necessary.

C. APPLICATION PROCEDURES

1. Regular Application Procedures

Completion of a program application form is necessary for consideration for participation. Applications are available from the ~~State Scholarship Administration~~ Office of Student Financial Assistance or from college and university financial aid offices. An applicant must provide:

a. A completed application;
b. Copies of the applicant's most recent Maryland tax return;
c. Proof of graduation from a college or university in Maryland; or a school of law;
d. A statement from an eligible employer confirming the nature of the job, length of employment, full-time status and annual salary; and
e. Current repayment data on all educational loans.

Applications must be received between June 1 and September 30 of each year. Award decisions will be announced in October of each year. Late applications will be accepted and considered if funds are available.

Recipients are given priority for renewal of an award for a second year as long as the recipient continues to meet the eligibility requirements. Recipients may reapply for assistance after the second year but are not given renewal priority.

2. Pre-graduation Application Procedures for Law Students

Law students attending the University of Maryland Baltimore and University of Baltimore Schools of Law that are in their third and final year of school may apply for the Loan Assistance Repayment Program and be pre-approved for a LARP award if they meet all eligibility requirements.

a. A pre-graduation application must be submitted and may be obtained from the Office of Student Financial Assistance or the Financial Aid Office at the University of Maryland Baltimore-School of Law or the University of Baltimore-School of Law.

b. The pre-graduation application will be available in September and may be submitted any time during the last year before graduation up to May 1st.

c. Verification of an employment offer must be forwarded to the Office of Student Financial Assistance as soon as received by the student.

d. A general application, available in June, must also be completed and submitted with all supporting documents by September 30.

D. SELECTION OF RECIPIENTS

1. Regular Application Process

All applicants who apply by the September 30 deadline and meet the eligibility requirements as established in Section B. will be considered for awards. Priority for participation in the program will be given to an individual who:

a. graduated from an institution of higher education in the last three years;

b. is a resident of Maryland;

c. is employed on a full-time basis; and

d. provides, as the principal part of the individual's employment, legal services, nursing services, or other services in an eligible field of employment in which there is a shortage of qualified practitioners to low income or underserved residents or areas of the State.

Priority fields of employment established by law are legal services and nursing services. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall review and establish additional priority fields of employment on an annual basis.

2. Pre-Graduation Law Students

Five students will be selected for an award on the basis of a pre-employment offer from an eligible employer in Maryland. The first five eligible students to send the Office of Student Financial Assistance verification of their employment offer will be pre-approved for the award. All pre-award applicants will be notified of their pre-award status via e-mail within five (5) working days after the receipt of their employment offer.

All other applicants will be considered in the general applicant pool. Award amounts vary and may not exceed $7,500 per year. Recipients are given priority for renewal of an award for the following year provided they re-submit an application by the September 30 deadline and continue to meet all eligibility requirements. Deadlines for the Pre-Graduation option are:

May 1 - Pre-Graduation Application
ASAP - Employment Offer
September 30 - Loan Assistance Repayment Application with all required documentation

E. AWARDING PROCEDURES

Eligible applicants employed in priority fields will be grouped according to the field; the number of awards will be evenly distributed among priority fields. Within priority fields, individuals will be ranked according to the highest annual loan debt-to-income ratio. Under circumstances in which individuals have identical debt-to-income ratios, lowest income will be used as the determining factor.

If available, remaining funds will be distributed to other eligible applicants in a similar manner.

Eligible individuals who apply after the September 30 deadline will be considered for awards if funds are available.

F. AWARD CALCULATION

Awards will be calculated on an annual basis. The annual award amount is calculated using the following formula:

Annual Award Amount = Total Annual Loan payments - Applicant's Contribution
Applicant's Contribution = Adjusted Salary x Fixed Percent Contribution
Adjusted Salary = Applicant's Salary - Dependent Allowance

The Dependent Allowance is $3,600 per dependent child under the age of 18.

Applicant's Contribution is calculated using the formula listed below:

Applicant's Adjusted Salary	Fixed Percent of Salary
Below - $20,000	0% of Salary
$20,001 - $25,000	2% of Salary
$25,001 - $30,000	3% of Salary

$30,001 - $35,000	4% of Salary
$35,001 - $40,000	5% of Salary
$40,001 – $45,000	6% of Salary
$45,001 - $50,000	7% of Salary

Applicants renewing a Loan Assistance Repayment Program award are given first priority. Remaining funds are then allocated to new applicants.

Awards may not exceed $7,500 per year.

G. OBLIGATION OF AWARD RECIPIENTS

Recipients are responsible for:

1. Verifying eligible employment and salary level initially and after six months of each year in the program;

2. Maintaining a current status on all educational debt;

3. Submitting a copy of their Maryland tax returns for any year during which an award is received; and

4. Notifying the ~~State Scholarship Administration~~ Office of Student Financial Assistance and the lending institutions of any changes in employment status and/or salary level that would change their award amount or make them ineligible for an award.

H. PAYMENT

The Commission issues checks co-payable to a Loan Assistance Repayment Program recipient and to the holder(s) of the Loan Assistance Repayment Program recipient's eligible higher education loans. The responsibility rests with theLARP recipient to endorse and forward the check(s) to the holder(s).

The award is paid in two installments. After receiving verification of eligible employment, payments are made in December and in March.

I. ANNUAL REPORT

The ~~State Scholarship Administration~~ Office of Student Financial Assistance is required to submit an annual statement by January 1 of each year to the General Assembly on the implementation of the Loan Assistance Repayment Program.

h:st:guidelines:larpgeneral
4/18/02 3:00:02 PM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Maryland HOPE, the Maryland Teacher and the Maryland Science and Technology Scholarship Programs

House Bill 316 was passed during the 2002 Maryland Legislative Session. This legislation modified the methodology for calculating grade point averages for students under the HOPE, the Maryland Teacher and the Maryland Science and Technology programs. The new method eliminates the re-calculation of the GPA based on core curriculum and instead uses the students overall GPA.

Senate Bill 734 established that a student enrolled as a part-time undergraduate may be eligible to receive the Maryland Teacher award.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Maryland HOPE, Maryland Teacher and the Maryland Science and Technology Scholarship Programs and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

MARYLAND HOPE SCHOLARSHIP

APPROVED: SEPTEMBER 21, 1999
REVISED & SUBMITTED: JUNE 2002

APPROVED: SEPTEMBER 21, 1999
REVISED & SUBMITTED: JUNE 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the
Maryland HOPE Scholarship

AUTHORITY

The Maryland HOPE Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2301) in 1999. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland HOPE Scholarship is to assist in meeting the State's need for well trained and highly skilled workers in program or career shortage areas. Students who perform well academically in high school and agree to work full-time in Maryland qualify for scholarship assistance.

B. ELIGIBILITY

To be eligible for assistance under the Maryland HOPE Scholarship program, an applicant must meet the following general requirements:

1. be a Maryland resident;

2. be a U.S. citizen or eligible noncitizen;

3. be in the senior year of high school at the time of application;

4. a. have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;

   b. <u>beginning in academic year 2003-2004 have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the completion of the first semester of the senior year.</u>

5. intend to enroll as a full-time student in an eligible academic program;

6. graduate from a secondary school in Maryland;

7. be accepted for admission in a regular undergraduate program at a Maryland higher education institution;

8. begin college within 2 years of completing high school;

9. have an annual total family income of $95,000 or below;

10. submit a completed Maryland HOPE Scholarship application to the State Scholarship Administration by March 1;

11. file the Free Application for Federal Student Aid by March 1; and

12. agree to perform the required service or repay the State if the service obligation is not performed.

C. APPLICATION PROCESS

Students must apply for a HOPE Scholarship by completing the application form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and filing by March 1. Applications completed by students will be submitted to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the designated high school official. The high school will provide for each applicant an official high school transcript reflecting high school grades through the first semester of the senior year and a grade point average ~~in core curriculum courses~~ calculated according to directions provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. Applications must be received by the ~~State Scholarship Administration~~ Office of Student Financial Assistance by March 1.

D. ELIGIBLE ACADEMIC PROGRAMS

The Maryland Higher Education Commission shall annually, by July 1, establish a list of academic programs eligible for the Maryland HOPE Scholarship Program. This priority list shall be created in consultation with the appropriate advisory boards of the Commission, the Department of Business and Economic Development, and representatives of higher education and private industry.

In any year in which an area is determined by the Commission to no longer be an area of critical shortage, no additional new awards will be made in that area. Awards will be renewed for qualified students who received an initial award prior to this determination.

E. AWARD AMOUNT

The award amount will be $3,000 annually for students enrolled at 4-year higher education institutions and $1,000 annually for students enrolled at 2-year higher education institutions. The scholarship can only be used for tuition and mandatory fees.

A student transferring from a 2-year eligible institution to a 4-year eligible institution may receive an annual award of $3,000, once the student is enrolled at the 4-year eligible institution.

F. SELECTION OF RECIPIENTS

Eligible applicants will be placed in rank order on the basis of cumulative grade point average~~ in core curriculum courses~~. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty and values for plus or minus grades are not used. If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. Recipients will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program.

G. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a ~~guaranteed~~ promissory note and submit both to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the date specified in the award notice.

H. RENEWAL AND CONTINUATION

A HOPE Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;

2. remains enrolled in an eligible institution;

3. remains enrolled in an eligible academic program;

4. remains enrolled as a full-time student for each semester;

5. maintains a minimum 3.0 cumulative grade point average;

6. makes satisfactory academic progress towards a degree according to the institutions standards; and

7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year and an award for a student enrolled in a baccalaureate degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as they meet all of the eligibility requirements.

A student transferring from a 2-year eligible institution to a 4-year eligible institution may hold the award for a total of 5 years, including the years at both the 2-year and 4-year higher education institution, as long as all of the eligibility requirements are met.

Following the spring semester, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will request the postsecondary institution to provide a certified cumulative grade point average for the academic year for the HOPE Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The Scholarship Administration does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's HOPE Scholarship will not be renewed. The Scholarship Administration also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled, along with the most recent cumulative grade point average achieved.

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once

again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

I. REVOCATION OF AWARD

The Maryland HOPE Scholarship is canceled if the student:

1. ceases to be a Maryland resident;

2. fails to enroll at a Maryland higher education institution in an eligible program;

3. fails to enroll as a full-time student and takes less than 12 credit hours each semester or its equivalent;

4. does not earn a 3.0 annual grade point average;

5. fails to make satisfactory academic progress towards a degree; or

6. fails to maintain the standards of the institution.

J. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;

2. is enrolled in an eligible academic program;

3. is enrolled for 12 or more hours as an undergraduate student; and

4. is making satisfactory academic progress towards a degree; and

5. maintains the standards of the institution.

K. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of undergraduate studies. The recipient is required to perform the service obligation for one year for each year that the recipient received a scholarship. On the forms provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement in the manner prescribed.

The service obligation begins after graduation and cannot be fulfilled prior to graduation.

L. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;

2. fails to receive the appropriate degree;

3. fails to complete the annual questionnaire on performance of service obligation;

4. fails to perform the service obligation for the required amount of time; or

5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

M. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the ~~State Scholarship Administration (SSA)~~ Office of Student Financial Assistance (OFSA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

   A recipient may receive a deferment during the time the recipient is:

   a. on a temporary leave of absence approved by the employer or the ~~SSA~~ OFSA from full-time employment in the required employment field;

   b. temporarily totally disabled, for a period not to exceed three years;

c. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled; or

d. seeking and unable to find the required employment for a single period not to exceed 12 months.

The total number of years a recipient may receive a deferment cannot exceed two.

2. To qualify for any of the deferments a recipient shall notify the State Scholarship ~~Administration~~ Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

a. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education;

b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;

c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;

d. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;

e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field.

The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods.

Before a deferment based on inability to find employment in the eligible field is granted, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

3. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:

   a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or

   b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.

N. APPEALS

1. Categories of Appeals

   Maryland HOPE Scholarship recipients can appeal their eligibility for an award for the following criteria:

   a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled or less than 12 credits can still be considered eligible for the HOPE Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.

   b. maintenance of a 3.0 cumulative grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to SSA of extenuating circumstances that prevented the student from achieving the required GPA.

2. Appeal Procedures

   The student must complete an appeal form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. In

completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

a. full-time equivalency: If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.

b. grade point average: The following circumstances are considered acceptable as grounds for an appeal:

(1) serious illness or injury of the student;

(2) serious illness of a member of the student's immediate family;

(3) serious personal emotional difficulties of the student;

(4) death of a member of the student's immediate family; or

(5) other serious personal circumstances.

O. FUNDING

The funding for the Maryland HOPE Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

h:st:guidelines:hopegen
4/17/02 4:04 PM

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

MARYLAND TEACHER SCHOLARSHIP

APPROVED: SEPTEMBER 21, 1999
REVISED & SUBMITTED: JUNE 2002

APPROVED: SEPTEMBER 21, 1999
REVISED & SUBMITTED: JUNE 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the
Maryland Teacher Scholarship

AUTHORITY

The Maryland Teacher Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2201) in 1999. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland Teacher Scholarship is to assist in meeting the State's need for well-trained and highly skilled teachers by assisting eligible persons to gain certification as teachers in the State. Students who perform well academically and agree to use their training in public schools as elementary or secondary school teachers qualify for scholarship assistance.

B. ELIGIBILITY

Due to the immediate need for certified teachers in shortage areas, for the 1999-2000 academic year college seniors and graduate students only are eligible for Maryland Teacher Scholarship assistance. In subsequent years, high school seniors and all college students pursuing teacher certification will be eligible for assistance under the Maryland Teacher Scholarship program.

1. To be eligible for assistance under the Maryland Teacher Scholarship program for the 1999-2000 academic year, an applicant must meet the following general requirements:

    a. be a Maryland resident;

    b. be a U.S. citizen or eligible non-citizen

c. be a full-time enrolled college senior at an eligible institution pursuing a course of study or program in an academic discipline leading to a Maryland professional teacher's certificate; or

d. be enrolled as a full-time graduate student at an eligible institution pursuing a course of study or program in an academic discipline leading to a Maryland professional teacher's certificate;

e. have an unweighted cumulative grade point average in college of at least 3.0 on a 4.0 scale or its equivalent at the time of application.

f. have been making satisfactory progress toward a degree in an academic discipline leading to a Maryland professional teacher's certificate;

g. submit a completed Maryland Teacher Scholarship application to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by July 31, 1999; and

h. agree to perform the required service obligation as an elementary or secondary school teacher in a Maryland public school or repay the State that portion of the service obligation not performed.

2. To be eligible for assistance under the Maryland Teacher Scholarship program for academic years 2000-2001 and beyond, an applicant must meet the following general requirements:

a. be a high school senior or college student at the time of application;

b. be a Maryland resident;

c. be a U.S. citizen or eligible non-citizen.

d. (1) have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;

(2) beginning in academic year 2003-2004 have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the completion of the first semester of the senior year.

e. Applying college students must have a 3.0 cumulative grade point average. The grade point average will only be calculated based on completed college course work. Cumulative grade point average for applying graduate students who have completed graduate course work will be calculated based only on completed graduate course work.

f. Enroll as a full-time or part-time undergraduate or graduate student in an academic program leading to professional teacher certification; or

~~g. enroll as a part-time graduate student in an academic program leading to professional teacher certification;~~

h. begin college within 2 years of completing high school if applying as a high school senior;

i. submit a completed Maryland Teacher Scholarship application to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by March 1; and

j. agree to perform the required service as an elementary or secondary school teacher within the Maryland public school system or repay the State that portion of the service obligation not performed.

C. APPLICATION PROCESS

Students must apply for a Maryland Teacher Scholarship by completing the application form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. Applications completed by students will be submitted to the ~~State Scholarship Administration~~ Office of Student Financial Assistance. For applying high school seniors the high school will provide an official transcript reflecting grades through the first semester of the year of application and a cumulative grade point average in ~~core curriculum courses calculated according to directions provided by the State Scholarship Administration]~~ overall coursework. All other college students will provide an official academic transcript from each college attended. Applications must be received by the ~~State Scholarship Administration~~ Office of Student Financial Assistance by March 1.

D. AWARD AMOUNT

The annual award amount is $5,000 for a full-time student enrolled at a 4-year higher education institution and $2,000 for a full-time student enrolled at 2-year higher education institution. A part-time undergraduate or graduate student attending a 4-year institution will receive $2,500 annually. A part-time undergraduate attending a 2-year

college will receive $1,000 per year. The scholarship may be used for tuition and mandatory fees.

E. SELECTION OF RECIPIENTS

1. For the 1999-2000 academic year eligible applicants will be placed in rank order on the basis of cumulative grade point average. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty, and values for plus or minus grades are not used. If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. Recipients will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program.

2. For ~~years subsequent to the 1999-2000~~ the academic years 2000-2001 and 2001-2002, eligible applicants will be placed into one of two groups:

   a. College sophomores, juniors, seniors, and graduate students, defined as students who have completed at least 28 credit hours. This group will receive 65% of awards.

   b. High school seniors and college freshmen, defined as undergraduate students who have completed less than 28 credit hours. This group will receive 35% of awards.

3. For years subsequent to the 2001-2002 academic year, eligible applicants will be placed into one of three groups:

   a. full-time sophomores, juniors, seniors, and graduate students, defined as students who have completed at least 28 credit hours and will enroll on a full-time basis. This group will receive approximately 60% of available funds based on the eligible applicant pool.
   b. High school seniors and college freshmen, defined as students who have completed fewer than 28 credit hours and will enroll on a full-time basis. These students will receive approximately 30% of available funds based on the eligible applicant pool.
   c. Part-time undergraduate and graduate students will be ranked by the number of credits which have been completed. These students will receive approximately10% of the available funds based on the eligible applicant pool.

Eligible applicants in each group will be placed in rank order on the basis of cumulative grade point average. Recipients will be selected based on a groupwide ranking of the student's cumulative grade point average, beginning with the highest grade point average.

F. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a ~~guaranteed~~ promissory note and submit both to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the date specified in the award notice.

G. RENEWAL AND CONTINUATION

A Maryland Teacher Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;

2. remains enrolled in an eligible institution;

3. remains enrolled in an eligible academic program leading to a Maryland professional teacher's certificate;

4. remains enrolled as a full-time or part-time undergraduate or ~~a full-time or part-time~~ graduate student for each semester;

5. maintains a minimum 3.0 cumulative grade point average;

6. makes satisfactory academic progress towards a degree according to the institutions standards; and

7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year. If a student is enrolled in an associate degree program that, as determined by the college, requires 3 years to complete, an award may be renewed for 2 years.

An award for a student enrolled in a baccalaureate or graduate level degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as they meet all of the eligibility requirements.

Following the spring semester, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will request the postsecondary institution to provide a certified cumulative grade point average for the academic year for the Maryland Teacher Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The ~~State Scholarship Administration~~ Office of Student Financial Assistance does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Maryland Teacher Scholarship will not be renewed. The ~~State Scholarship Administration~~ Office of Student Financial Assistance also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled.

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

H. REVOCATION OF AWARD

The Maryland Teacher Scholarship is canceled if the student:

1. ceases to be a Maryland resident;

2. fails to enroll at a Maryland higher education institution in an eligible program;

3. fails to enroll as a full-time student taking at least 12 credit hours each semester in an undergraduate program, or 9 credit hours each semester in a graduate program, or its equivalent; or

4. fails to enroll as a part-time undergraduate or graduate student taking at least 6 credit hours each semester;

5. does not earn a minimum 3.0 cumulative grade point average;

6. fails to make satisfactory academic progress towards a degree or certificate; or

7. fails to maintain the standards of the institution.

I. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;

2. is enrolled in an eligible academic program leading to a Maryland professional teacher's certificate;

3. is enrolled for 12 or more hours as a full-time undergraduate, 9 or more hours as a full-time graduate student, or 6 or more hours as a part-time undergraduate or graduate student;

4. is making satisfactory academic progress towards a degree; and

5. maintains the standards of the institution.

J. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of certificate or degree program. The recipient is required to perform the service obligation for one year for each year that the recipient received the scholarship. For each partial year, in addition to a complete academic year, that the recipient receives the scholarship, one year of service must be performed. Eligible employment is defined as full-time employment as an elementary or secondary school teacher in a Maryland public school. On the forms provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement.

The service obligation begins after completion of the degree or certification program, and cannot be fulfilled prior to completion.

A recipient of the Maryland Teacher Scholarship who also receives a Distinguished Scholar Teacher award may not fulfill the required service obligations of both scholarships concurrently. The recipient must fulfill the service obligation for the Maryland Teacher

Scholarship in addition to the service obligation for the Distinguished Scholar Teacher award, one year for each year or partial year that the recipient received the award.

K. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;

2. fails to receive the appropriate degree;

3. fails to complete the annual questionnaire on performance of service obligation;

4. fails to perform the service obligation for the required amount of time; or

5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

L. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the ~~State Scholarship Administration (SSA)~~ Office of Student Financial Assistance (OSFA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in Maryland public schools.

A recipient may receive a deferment during the time the recipient is:

a. on a temporary leave of absence approved by the employer or the SSA (OSFA) from full-time employment in the required employment field;

b. temporarily totally disabled, for a period not to exceed three years; or

c. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled;

d. The total number of years a recipient may receive a deferment cannot exceed three.

2. To qualify for any of the deferments a recipient shall notify the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

a. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;

b. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;

c. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;

d. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field.

The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find employment in the eligible field is granted, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

3. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall waive a recipient's grant repayment obligation if it determines:

a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or

b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died;

4. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall forgive a recipient of a Maryland Teacher Scholarship for up to 2 years of an award if:

a. the recipient has taken the teacher certification examination, approved by the State Board of Education, in 2 consecutive years; and

b. the recipient fails to pass the teacher certification examination within the time period specified by the ~~State Scholarship Administration~~ Office of Student Financial Assistance.

M. APPEALS

1. Categories of Appeals

Maryland Teacher Scholarship recipients can appeal their eligibility for an award for the following criteria:

a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled for less than 12 credits can still be considered eligible for the Maryland Teacher Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.

b. maintenance of a 3.0 cumulative grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to the ~~SSA~~ OSFA of extenuating circumstances that prevented the student from achieving the required GPA.

2. Appeal Procedures

The student must complete an appeal form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

a. full-time equivalency: If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.

b. grade point average: The following circumstances are considered acceptable as grounds for an appeal:

(1) serious illness or injury of the student;

(2) serious illness of a member of the student's immediate family;

(3) serious personal emotional difficulties of the student;

(4) death of the student or a member of the student's immediate family; or

(5) other serious personal circumstances.

N. FUNDING

The funding for the Maryland Teacher Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

SCIENCE AND TECHNOLOGY SCHOLARSHIP

APPROVED: OCTOBER 13, 1998
REVISED & SUBMITTED: JUNE 2002

APPROVED: OCTOBER 13, 1998
REVISED & SUBMITTED: MAY 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the
Maryland Science and Technology Scholarship

AUTHORITY

The Maryland Science and Technology Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2001) in 1998. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland Science and Technology Scholarship is to assist in meeting the State's need for well trained and highly skilled workers in shortage areas. Students who perform well academically in high school and agree to use their training in eligible programs as members of Maryland's workforce qualify for scholarship assistance.

B. ELIGIBILITY

To be eligible for assistance under the Maryland Science and Technology Scholarship program, an applicant must meet the following general requirements:

1. be a Maryland resident;

2. be a U.S. citizen or eligible non-citizen;

3. graduate from a secondary school;

4. a. have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;

   b. beginning in academic year 2003-2004 have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the completion of the first semester of the senior year.

5. is enrolled or intends to enroll as a full-time student in an eligible academic program;

6. be accepted for admission in a regular undergraduate program at a Maryland higher education institution; or

7. be enrolled as a full-time student at an eligible institution pursuing a course of study or program in an eligible program and have an unweighted cumulative grade point average in college of at least 3.0 on a 4.0 scale or its equivalent at the time of application;

8. begin college within 5 years of completing high school;

9. submit an appropriately completed Maryland Science and Technology Scholarship application with an official transcript to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by March 1; and

10. agree to perform the required service or repay the State if the service obligation is not performed.

C. APPLICATION PROCESS

Students must apply for a Science and Technology Scholarship by completing the application form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. Applications completed by students will be submitted to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the designated high school official. The high school will provide for each applicant an official high school transcript reflecting high school grades through the first semester of the senior year and a grade point average ~~in core curriculum courses~~ calculated according to directions provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance (see B.4.). Applications must be received by the ~~State Scholarship Administration~~ Office of Student Financial Assistance by March 1.

D. ELIGIBLE ACADEMIC PROGRAMS

The Maryland Higher Education Commission shall annually, by June 1, establish a list of academic programs eligible for the Maryland Science and Technology Scholarship Program. This list shall be established by consulting with the Department of Business and Economic Development, the Department of Labor, Licensing, and Regulation and the appropriate Commission advisory boards. The Commission shall take into account such factors as economic growth and the needs of Maryland's science and technology industry and business community.

Students currently receiving the Maryland Science and Technology Scholarship would be allowed to change their major to another major deemed eligible by the Commission for this scholarship program. The service obligation would require the student to work in the State in the career field in which he/she graduated for the total number of years he/she received a Science and Technology Scholarship.

In any year in which an area is determined by the Commission to no longer be an area of critical shortage, no additional new awards will be made in that area. Awards will be renewed for qualified students who received an initial award prior to this determination.

E. AWARD AMOUNT

The award amount will be $3,000 for students enrolled at 4-year higher education institutions and $1,000 for students enrolled at 2-year higher education institutions. The scholarship can only be used for tuition and mandatory fees.

F. SELECTION OF RECIPIENTS

Eligible applicants will be placed in rank order on the basis of cumulative grade point average ~~in core curriculum courses~~. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty and values for plus or minus grades are not used. If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. High School applicants will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program. Currently enrolled college applicants will be ranked by grade point average and selected after high school applicants have been awarded.

G. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a ~~guaranteed~~ promissory note and submit both to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the date specified in the award notice.

H. RENEWAL AND CONTINUATION

A Science and Technology Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;

2. remains enrolled in an eligible institution;

3. enrolls in an eligible academic program;

4. remains enrolled as a full-time student for each semester;

5. maintains a 3.0 annual grade point average;

6. makes satisfactory academic progress towards a degree according to the institutions standards; and

7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year and an award for a student enrolled in a baccalaureate degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as he/she meet all of the eligibility requirements.

Following the spring semester, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will request the postsecondary institution to provide a certified annual grade point average for the academic year for the Science and Technology Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The Scholarship Administration does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Science and Technology Scholarship will not be renewed. The Scholarship Administration also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the

academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled.

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once

again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

I. REVOCATION OF AWARD

The Maryland Science and Technology Scholarship is canceled if the student:

1. ceases to be a Maryland resident;

2. fails to enroll at a Maryland higher education institution in an eligible program;

3. fails to enroll as a full-time student and takes less than 12 credit hours each semester or its equivalent;

4. does not earn a 3.0 annual grade point average;

5. fails to make satisfactory academic progress towards a degree; or

6. fails to maintain the standards of the institution.

J. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;

2. is enrolled in an eligible academic program;

3. is enrolled for 12 or more hours as an undergraduate student; and

4. is making satisfactory academic progress towards a degree; and

5. maintains the standards of the institution.

K. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of undergraduate studies. The recipient is required to perform the service obligation for one year for each year that the recipient received a scholarship. The employment must be in an occupation directly related to the eligible program of study. On the forms provided by the ~~State Scholarship Administration~~ Office of Student Financial

Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement in the manner prescribed.

The service obligation begins after graduation and cannot be fulfilled prior to graduation.

L. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;

2. fails to receive the appropriate degree;

3. fails to complete the annual questionnaire on performance of service obligation;

4. fails to perform the service obligation for the required amount of time; or

5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

M. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the ~~State Scholarship Administration (SSA)~~ Office of Student Financial Assistance (OSFA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

   A recipient may receive a deferment during the time the recipient is:

   a. enrolled in a full-time undergraduate course of study at an institution of higher education in a degree granting program for a period not to exceed twelve months;

b. enrolled in an academic or a professional program that leads to a certificate or advanced degree which is relevant to employment in a science and technology occupation for a period not to exceed five years from the date the student earned an undergraduate degree;

c. on a temporary leave of absence approved by the employer or the ~~SSA~~ (OSFA)—from full-time employment in the required employment field for a period not to exceed twelve months;

d. temporarily totally disabled, for a period not to exceed three years;

e. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled; or

f. seeking and unable to find the required employment for a single period not to exceed 12 months.

To qualify for any of the deferments a recipient shall notify the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

a. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education;

b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;

c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;

d. a sworn affidavit of a qualified physician if the recipient is unable to ind employment by reason of the care required by spouse or child who is disabled;

e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field.

2. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall review all documentation to determine whether the

deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find employment in the eligible field is granted, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

3. The ~~State Scholarship Administration~~ Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:

   a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or

   b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.

N. APPEALS

1. Categories of Appeals

Science and Technology recipients can appeal their eligibility for an award for the following criteria:

   a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled for less than 12 credits can still be considered eligible for the Science and Technology Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.

   b. maintenance of a 3.0 annual grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to SSA of extenuating

circumstances that prevented the student from achieving the required GPA.

c. applicants having less than a 3.0 GPA in high school core curriculum may appeal the ineligibility in writing to the Director of the ~~State Scholarship Administration~~ Office of Student Financial Assistance. The written appeal should detail reasons and/or circumstances that would justify reversal of the decision, including all appropriate documentation. The Director will review each case and make a decision based on the written materials submitted. All decisions of the Director are final.

2. Appeal Procedures

The student must complete an appeal form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

a. (full-time equivalency) If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.

b. (grade point average) The following circumstances are considered acceptable as grounds for an appeal:

(1) serious illness or injury of the student;

(2) serious illness of a member of the student's immediate family;

(3) serious personal emotional difficulties of the student;

(4) death of a member of the student's immediate family; or

(5) other serious personal circumstances.

O. FUNDING

The funding for the Maryland Science and Technology Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

h:st:guidelines:scitech
4/17/02 4:07 PM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Edward T. Conroy Scholarship

House Bill 300 passed during the 2002 Maryland Legislative Session. This legislation expands the eligibility under the Conroy Scholarship to include the sons and daughters and surviving spouses of persons killed as a result of terrorist attacks on the World Trade Center in New York City, the Pentagon in Washington D.C. and the downing of United Airlines flight #93 on September 11, 2001.

House Bill 399 also passed during the 2002 Maryland Legislative Session. This legislation revised the eligibility criteria for veterans who suffer a service related disability from a 50% disability to a 25% disability.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Edward T. Conroy Scholarship Program and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 - 2258

MARYLAND HIGHER EDUCATION COMMISSION
~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

EDWARD T. CONROY MEMORIAL SCHOLARSHIP PROGRAM

APPROVED: JUNE 12, 1997
REVISED & SUBMITTED: JUNE 2002

APPROVED: June 12, 1997
REVISED & SUBMITTED: JUNE 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the
Edward T. Conroy Memorial Scholarship Program

AUTHORITY

The Edward T. Conroy Memorial Scholarship Program (Annotated Code of Maryland - Education Article Section 18-601) was consolidated with two other memorial scholarship programs in the 1990 Maryland General Assembly session. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The Edward T. Conroy Memorial Scholarship Program is designed to provide financial assistance to sons and daughters of deceased, missing in action or prisoner of war United States armed forces personnel, sons and daughters of deceased public safety personnel, surviving spouses who have not remarried of deceased public safety personnel, disabled public safety personnel and sons, daughters and/or surviving spouses of victims of the September 11, 2001 terrorist attacks, attending a Maryland postsecondary institution.

B. ELIGIBILITY

To be eligible for the Edward T. Conroy Scholarship Program, an individual must attend a Maryland postsecondary institution on at least a part-time basis and be one of the following:

1. a son or daughter at least 16 years old, whose parent:

    a. served in the United States Armed Forces after December 7, 1941 and was a Maryland resident at the time the parent died or was totally and permanently disabled as a result of military service;

    b. was a Maryland resident at the time the parent was declared to be a prisoner of war or missing in action as a result of the Vietnam Conflict; or

    c. was a State or local public safety employee killed in the line of duty;

d. was a prisoner of war as a result of the Vietnam Conflict on or after January 1, 1960 and was a resident of Maryland at the time the applicant was declared to be a prisoner of war or missing in action;

e. was a victim of the September 11, 2001 terrorist attacks.

2. a surviving spouse (a person who has not remarried) of a State or local public safety employee killed in the line of duty or a victim of the September 11, 2001 terrorist attacks; or

3. a 100 percent disabled public safety employee; or

4. a Veteran who suffers a service–related disability of ~~50%~~ 25% or greater; and who has exhausted or is no longer eligible for federal veteran's educational benefits.

A state or local public safety employee is defined as a person who is:

1. a career or volunteer member of a fire department, ambulance/rescue company or squad;

2. a law enforcement officer;

3. a correctional officer; or

4. a Maryland resident who was a member of the Maryland National Guard at the time of death.

A disabled public safety employee is defined as a state or local public safety employee who sustains an injury in the line of duty that precludes the individual from continuing to serve or be employed as a state or local public safety employee.

In the case of a volunteer member of a fire department, ambulance/rescue squad or company, the disability must preclude the member from continuing to be employed in a nonpublic safety occupation in which the member was engaged at the time of injury.

A victim of the September 11, 2001 terrorist attacks is defined as a Maryland resident who was killed as a result of the attacks on the World Trade Center in New York City, the attack on the Pentagon in Virginia, or the crash of United Airlines flight #93 in Pennsylvania on September 11, 2001.

C. AWARD AMOUNT

The annual award may not exceed the equivalent annual tuition and mandatory fees of a resident undergraduate at a four-year public institution of higher education within the University

System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

Awards to the sons, daughters or spouses of victims of the September 11, 2001 terrorist attacks may not exceed the amount specified above when combined with any other scholarships received by a student based on the student's status as a child or spouse of a victim of the September 11, 2001 terrorist attacks.

D. APPLICATION PROCEDURES

Completion of a specific program application form is required for the Edward T. Conroy Memorial Scholarship Program. The application form is available from the ~~State Scholarship Administration~~ Office of Student Financial Assistance.

Application procedures differ for new applicants and renewal applicants. If a student has already received an award, or has previously completed a new application form, a re-application form is filed. If a student has never filed an application with the ~~State Scholarship Administration~~ Office of Student Financial Assistance for the Edward T. Conroy Scholarship Program, then a new application form is necessary.

1. New Application Procedures

Students applying for the first time must provide:

a. a completed Application Form;

b. if a child is applying, a birth certificate showing the names of both parents;

c. if a spouse is applying, a marriage certificate; and

d. official verification from:

(1) the United States Veterans Administration if the applicant's parent was killed, or totally disabled as a result of military service or is a prisoner of war or missing in action;

(2) the United States Veterans Administration if the applicant is a Veteran who suffers a service–related disability of ~~50%~~ 25% or greater; and who has exhausted or is no longer eligible for federal veteran's educational benefits;

(3) the state or local public safety personnel office if the applicant's spouse was killed in the line of duty;

(4) the state or local public safety personnel office if the applicant's parent was killed in the line of duty;

(5) the state or local public safety personnel office if the applicant is a disabled public safety employee; or

(6) the nonpublic safety employer and the local public safety personnel office if the disability was a result of service while the applicant was a volunteer member of a fire department, ambulance/rescue squad or company; or

(7) a copy of the death certificate that shows date, location and/or cause of death to have been as a result of the attacks on the World Trade Center, the Pentagon or the crash of United Airlines Flight #93 on September 11, 2001.

New applicants will be encouraged to apply by July 15 of each year, but applications will be accepted throughout the year. Awards will be made to students who apply after July 15 on a rolling basis as long as funds are available.

2. Re-application Procedures

Students applying who have applied previously and were deemed eligible for the Edward T. Conroy Memorial Scholarship Program must complete a reapplication form and return it to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by July 15 each year.

Re-applications will be accepted on a continuous basis as long as funds are available.

E. AWARDING PROCEDURES

Eligible applicants who receive the Edward T. Conroy Memorial Scholarship will be notified of the award in writing. In order to accept an award, a recipient must provide the ~~State Scholarship Administration~~ Office of Student Financial Assistance with a written acceptance of the award.

The ~~State Scholarship Administration~~ Office of Student Financial Assistance may not award more than 15 scholarships annually to Veterans who suffer from a service-related disability of ~~50%~~ 25% or greater.

F. PAYMENT

Payment is made directly to the institution the applicant is attending. At the beginning of each school term, institutions will be asked to review Billing Rosters provided by the ~~State~~

~~Scholarship Administration~~ Office of Student Financial Assistance to certify that the recipient is enrolled.

Upon receipt of the institution's certification, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will disburse the adjusted amount to be credited to the student's account.

G. RENEWAL AND CONTINUATION

An Edward T. Conroy Memorial Scholarship Program may be renewed on an annual basis for up to five years of full-time study or eight years of part-time study if the recipient:

1. is enrolled on at least a part-time basis in an eligible Maryland postsecondary institution; and

2. continues to meet all other eligibility requirements.

H. REVOCATION OF AWARD

An award will be revoked if any of the criteria stated in section F - Payment and section G - Renewal and Continuation are not met, or if the recipient makes any changes to name, address or any other information pertinent to the Edward T. Conroy Memorial Scholarship Program and fails to inform the ~~State Scholarship Administration~~ Office of Student Financial Assistance in writing.

I. APPEAL PROCEDURES

Appeals to decisions of ineligibility or revocation of an award are made to the Director of the ~~State Scholarship Administration~~ Office of Student Financial Assistance. All appeals must:

1. be in writing;

2. be submitted within thirty (30) days of notice of ineligibility or cancellation of award; and

3. detail reasons and/or circumstances that would justify reversal of the original decision.

The Director will review each case and issue a decision no later than forty-five (45) days after receiving the appeal. All decisions of the Director are final.

h:st:guidelines:conroy
4/17/02 3:50 PM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Developmental Disabilities & Mental Health Workforce Tuition Assistance Program

Senate Bill 174 was passed during the 2002 Maryland Legislative Session. This legislation changes the Developmental Disabilities & Mental Health Workforce Tuition Assistance Program by allowing eligible students to take courses in the summer to meet the annual 12 credit hour requirement. The changes also establish that the recipient may work at a "for profit" as well as a non-profit program or agency that serves Maryland residents with mental health or developmental disabilities to fulfill their service obligation.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Developmental Disabilities and Mental Health Workforce Tuition Assistance Program and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

DEVELOPMENTAL DISABILITIES AND MENTAL HEALTH WORKFORCE TUITION ASSISTANCE PROGRAM

APPROVED: NOVEMBER 11, 1999
REVISED & SUBMITTED: JUNE 2002 (EFFECTIVE 10/01/02)

APPROVED: November 11, 1999
REVISED & SUBMITTED: June 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the
Developmental Disabilities and Mental Health Workforce
Tuition Assistance Program

AUTHORITY

This program of tuition assistance was enacted by the 1999 Maryland General Assembly. This law, codified in the Annotated Code, Education Article, §18-2101, gives the Maryland Higher Education Commission the authority to adopt guidelines or regulations to administer this program.

A. Purpose

The purpose of this program is to establish a program of tuition assistance to certain individuals who are employees or agree to work as employees of community-based programs serving individuals with certain disabilities.

B. Eligibility

A recipient of the Developmental Disabilities and Mental Health Workforce Tuition Assistance must:

1. be a Maryland resident;

2. be a U.S. citizen or eligible non-citizen;

3. possess a high school diploma or its equivalent;

4. intend to enroll as a full or part-time student in a degree program in human services, be accepted for admission as a full or part-time student in an eligible institution of higher education in Maryland;

5. submit an appropriately completed Developmental Disabilities and Mental Health Workforce Tuition Assistance Program application to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by July 1; and

6. agree to work in a community-based program that serves individuals with disabilities for: 1) a total of 2000 hours if the award received totals $1999 or

less; 2) 3000 hours of service if the award amount is $2000 - $3999; and 3) 4000 hours of service if the award amount is $4000 or more, or repay the State if the service obligation is not performed.

C. Application Process

Applicants must apply for Developmental Disabilities and Mental Health Workforce Tuition Assistance by completing the application form provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance, and filing by July 1. Applications are available from the ~~State Scholarship Administration~~ Office of Student Financial Assistance and from certain eligible employers.

D. Award Amount

The Developmental Disabilities and Mental Health Workforce Tuition Assistance may be used for tuition and fees, room and board, and books and supplies. A student may receive assistance up to $100 per credit hour. The amount of assistance may not exceed:

1. $2,000 in any one academic year for a student enrolled in a 2-year program; $500 per semester if enrolled part-time or $1000 per semester if enrolled full-time.

2. $3,000 in any one academic year for a student enrolled in a program leading to a bachelor's degree; $750 per semester if enrolled part-time or $1500 per semester if enrolled full-time.

3. Tuition assistance for each recipient may be used for a period of no more than 5 years and may not exceed $6000.

E. Selection of Recipients

Applicants will be placed into one of two groups:

1. Applicants who currently work as direct service employees in community-based programs. Seventy percent of funds will be awarded to this group.

2. Applicants who do not currently work as direct service employees in community-based programs. Thirty percent of funds will be awarded to this group.

3. Students not currently employed in eligible humans services fields will be ranked by cumulative GPA earned in any college courses or on a high school transcript if student has not earned college credits.

4. Any funds remaining in either applicant pool will be reallocated to meet the demands of the larger applicant pool after the initial awards are made.

5. An equal distribution between full and part time students will be made and an equal distribution between eligible sites as defined in section J if funds are insufficient to award all eligible applicants.

F. Award Notification

Recipients will be notified in writing of the tuition assistance award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a ~~guaranteed~~ promissory note and submit both to the ~~State Scholarship Administration~~ Office of Student Financial Assistance by the date specified on the award notice.

G. Renewal and Continuation

Developmental Disabilities and Mental Health Tuition Assistance may be renewed on an annual basis up to a maximum amount of $6,000 or 5 years if the recipient completes the application form and maintains satisfactory progress as established by the institution.

Tuition assistance will not be automatically reviewed if the original award was canceled due to ineligible number of credits taken per semester, or failure to maintain satisfactory academic progress. A recipient who is academically ineligible will forfeit the award for one academic semester. The award will be reinstated for the following academic semester upon proof of meeting institutional standards.

A student transferring from one institution to another may continue to receive the award as long as the student meets all of the eligibility requirements.

H. Revocation of Award

The Developmental Disabilities and Mental Health Workforce Tuition Assistance will be canceled if the student:

1. ceases to be a Maryland resident;

2. fails to enroll at a Maryland higher education institution in a degree program in human services;

3. fails to enroll as a full or part-time student;

4. fails to make satisfactory progress toward a degree; or

5. fails to maintain the standards of the institution.

I. Payment

Payment is made directly to the institution. At the beginning of each semester, the institution will be asked to review a billing roster provided by the ~~State Scholarship Administration~~ Office of Student Financial Assistance to certify that the recipient:

1. is enrolled at the institution;

2. is enrolled in human services program; and

3. meets all other eligibility requirements established by the institution.

Upon receipt of the institution's certification, the ~~State Scholarship Administration~~ Office of Student Financial Assistance will disburse funds to be credited to the student's account.

J. Service Obligation

Recipients are required to begin employment in the state within six months after completion of undergraduate studies. The recipient is required to work in a ~~non-profit~~ community-based program for a maximum 4,000 hours of continuous full or part-time employment as determined by the amount of funds received in section B (g) licensed by the Developmental Disabilities Administration or approved by the Mental Hygiene Administration to provide habilitation, rehabilitation, residential, or related community support services to individuals with developmental disabilities or mental disorders.

Upon graduation from an eligible human services program, the recipient must complete a questionnaire issued by the ~~State Scholarship Administration~~ Office of Student Financial Assistance providing information on employment. Employment verification is obtained from the recipient's direct supervisor.

Prior employment in a community-based program may not be applied to the employment requirement. However, once an award has been received, concurrent employment in an eligible field will count toward the total hours required to complete the service obligation.

K. Repayment

A recipient will be required to repay the State if the recipient:

1. fails to earn at least 12 credit hours in each academic year, including the summer term, in which the student receives assistance;

2. fails to make satisfactory progress toward fulfilling all degree requirements of the institution or has been revoked in accordance with Section H;

3. fails to perform the service obligation for the required amount of time; or

4. to complete the questionnaire on performance of the service obligation.

The interest rate on amounts required to be repaid shall be calculated at an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year, with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. The recipient will be required to begin repayment within 6 months of the date of failure to comply with the educational or employment requirements. The recipient must repay the State in full within 6 years after the repayment period begins, and shall follow a repayment schedule established by the State Scholarship Administration The Office of Student Financial Assistance.

L. Deferment or Waiver of the Service Obligation and Repayment

~~The State Scholarship Administration~~ The Office of Student Financial Assistance may waive or defer repayment in the event of:

1. loss of employment during the period of required employment due to involuntary termination unrelated to the performance of the employee;

2. disability or extended illness which prevents the student from fulfilling either the educational or employment requirements; or

3. the student is unable to find employment within 6 months of graduation.

M. Funding

The funding for the Developmental Disabilities and Mental Health Workforce Tuition Assistance Program shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

h:st:guidelines:devdis
4/17/02 3:53 PM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Educational Excellence Award Program

Senate Bill 453 was passed during the 2002 Maryland Legislative Session. This legislation established a program to provide late (after March 1st) applicants who are Pell eligible an opportunity to participate in the Educational Assistance Grant (EAG). Funds are distributed to the campuses based on the proportion of Pell eligible Maryland residents enrolled at each institution.

Institutions are required to make awards under the program utilizing the same formula used for current EAG awards. Each institution will provide the Commission with an annual report describing the use of the funds.

The attached guidelines reflect the changes required under the legislation that was passed.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the changes to guidelines for the Educational Excellence Award Program and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION

~~STATE SCHOLARSHIP ADMINISTRATION~~
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

EDUCATIONAL EXCELLENCE AWARD PROGRAM

APPROVED: OCTOBER 14, 1997
REVISED & SUBMITTED: JUNE 2002

APPROVED: OCTOBER 14, 1997
REVISED & SUBMITTED: JUNE 2002

MARYLAND HIGHER EDUCATION COMMISSION
~~State Scholarship Administration~~
Office of Student Financial Assistance

Guidelines for the Educational Excellence Award Program

AUTHORITY

This program of student assistance was enacted into law by the 1991 Scholarship Reform Act as passed by the Maryland General Assembly (Annotated Code, Education Article, Section 18-301). This law gives the Maryland Higher Education Commission of Maryland the authority to adopt regulations to administer the program.

A. PURPOSE

The purpose of the Educational Excellence Award (EEA) program is to provide need based scholarship assistance. The state's neediest students will be guaranteed access to postsecondary education in Maryland through Guaranteed Access (GA) Grants. Low and middle-income students will be awarded financial assistance through Educational Assistance (EA) Grants. The Educational Excellence Award program will use monies from the State of Maryland General Fund, combined with federal Leveraging Educational Assistance Partnership (LEAP) dollars.

B. ELIGIBILITY

1. To be eligible for financial assistance under the Educational Excellence Award program, an applicant must meet the following general requirements:

    a. be a Maryland resident;

    b. file the Free Application for Federal Student Aid (FAFSA) by the March 1 deadline for priority funding under the GA Program or to be eligible for the EA Program;

    c. be enrolled as a full-time student;

    d. be accepted for admission in a regular undergraduate program leading to a degree or a diploma at an eligible institution;

e. demonstrate financial need based on the ~~State Scholarship Administration (SSA)~~ Office of Student Financial Assistance (OSFA) formula described in E.1

f. ~~hold no other scholarship, other than a Distinguished Scholar Award, an Economic Development Student Assistance Grant, a Science & Technology Scholarship Award, a Maryland Teacher Scholarship or a General Hope Scholarship (effective AY 2000-2001) from the State of Maryland.~~

2. To be eligible for a Guaranteed Access Grant, applicants must meet the following additional requirements:

a. file a GA Grant application with the ~~SSA~~ OSFA by March 1 to be eligible for priority funding;

b. have an annual total family income below 130% of the federal poverty level as reported on the FAFSA;

c. begin college within one year of completing high school;

d. be under the age of 22 at the time of the first award;

e. have successfully completed a college preparatory program in high school (College preparatory programs are defined by ~~SSA~~ OSFA as those programs established by local educational agencies (LEAs) which are designed to prepare students for college level work, including programs that prepare students to achieve a two-year technical degree from a community college);

f. have completed high school in the State of Maryland with an unweighted cumulative grade point average (GPA) of at least 2.5 on a 4.0 scale or its equivalent;

g. submit a high school transcript to the ~~SSA~~ OSFA after the completion of the first semester of the senior year along with the GA application by March 1; and

h. be in senior year of high school at the time of initial application.

C. APPLICATION

Students can apply for an Educational Assistance Grant or a Guaranteed Access Grant as follows:

1. Educational Assistance Grant - students must file a FAFSA by March 1 each year.

2. Guaranteed Access Grant - students should file a FAFSA by March 1 each year. In addition, first time applicants should submit to the ~~State Scholarship Administration~~ Office of Student Financial Assistance a Guaranteed Access Grant Application by March 1.

D. AWARD AMOUNT

Under the Educational Excellence Award program, award amounts will be determined by the ~~State Scholarship~~ Office of Student Financial Assistance based on financial need.

1. The statute for the Educational Assistance Grant authorizes award amounts ranging between $400 and $3,000 to be awarded in $100 increments. The Commission will establish a maximum award of $2700 for fiscal year 2001, increasing annually by $100 until the $3000 maximum is reached

2. Students qualifying for a Guaranteed Access Grant will receive an award equal to one hundred percent of the student's adjusted financial need as described in E (Award Calculation, below). Award amounts will range from $400 up to ~~the cost of attendance for a full-time resident undergraduate living on campus at the University of Maryland College Park,~~ a maximum award not to exceed the equivalent annual expenses of a full-time resident undergraduate at the four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, as calculated by ~~SSA~~ OSFA, in $100 increments.

E. AWARD CALCULATION

1. Determination of Financial Need

~~SSA~~ OSFA Cost of Attendance
minus Total Family Contribution x Regional Cost of Living Adjustment
minus HOPE Scholarship or Economic Development Student Assistance Grant
minus Estimated Pell Grant
equals ~~SSA~~ OSFA Adjusted Need

- Total Family Contribution is determined using the Federal Methodology formula.

- The Regional Cost of Living Adjustment is determined annually by the Commission.

~~SSA~~ OSFA Cost of Attendance is calculated using the following classifications:

- Student living with parents: Tuition and Mandatory Fees plus $2500
- Student living off-campus: Tuition and Mandatory Fees plus $4000
- Student living on-campus: Tuition and Mandatory Fees, Room and Board plus $900

2. Awards made under the EEA program are calculated using data from the FAFSA.

   a. Educational Assistance Grants are calculated in the following manner:

      ~~SSA~~ OSFA Adjusted Need X 30% to 40% =Educational Assistance Grant

   b. Guaranteed Access Grants are calculated in the following manner:

      ~~SSA~~ OSFA Adjusted Need X 100% = Guaranteed Access Grant

      The maximum Guaranteed Access Grant is limited to ~~the cost of attendance for a full-time resident undergraduate living on campus at the University of Maryland College Park~~ the amount specified in D.2.

   c. Award amounts are calculated on an annual basis and are rounded to the nearest $100. If a student's award amount falls below $400, they are not eligible for an award. Awards are made for the Fall and Spring semesters in the academic year with one-half of the annual amount awarded for each semester.

3. Awards are based on information provided by the student to the federal processor. Errors on the application that are corrected by students after the deadline will be accepted by ~~SSA~~ OSFA. Changes in award amounts as a result of corrections will be handled as follows:

   a. EA and GA Grants - If a correction results in a decrease in an award amount, the award will be adjusted and the student notified of the change. If a correction results in an increase in an award, the increase will be funded only if monies are available.

   b. GA Grants Only - If a correction in family income or size results in the student no longer being eligible for a GA Grant, the student's award will be recalculated as an EA Grant.

F. DISTRIBUTION OF FUNDS AND SCHEDULE OF REDUCTIONS

On an annual basis the Secretary of Higher Education will determine an amount to be allocated from the Educational Excellence Awards Program budget specifically to award Guaranteed Access Grants. The remainder of the funds will be awarded as Educational Assistance Grants.

Prior to making GA and EA Grants, the ~~SSA~~ OSFA will determine the funds required to award GA Grants at 100 percent of need. If the remaining funds are sufficient to make EA Grants at the same level as in the prior year in terms of the percent of need met and the number of recipients, the ~~SSA~~ OSFA will proceed with making awards. If funds are not sufficient to fund the GA Grants at 100 percent of need and maintain the EA Grants at the same level as the prior year, the Secretary will determine a schedule of reductions for GA and EA Grants. The minimum funding for the EA Grant will not fall below the level of 30 percent of need with a maximum award of $3,000.

If additional funds are available after GA Grants are funded at 100 percent of need and EA Grants are funded at the same level as the prior year, the additional funds will be used to increase the percent of need met and the maximum award in the EA Grant up to 40 percent and $3,000, unless otherwise determined by the Commission within the first four years of implementation.

G. SELECTION OF RECIPIENTS

Applications for the Guaranteed Access Grant, which are filed by March 1, will be funded prior to all other Educational Excellence Awards applicants. Applications filed after that date will be processed on a first come first serve basis. ~~until all funds in the GA Grant Program are expended.~~

1. First time GA applicants who submit their applications prior to March 1 and all renewal GA applicants who meet all eligibility requirements will be awarded first.

2. All other GA applicants will be awarded on a first-come first-serve basis ~~until all funds are exhausted~~.

3. Applicants eligible for the EA Grant will be selected in the following manner:

   a. renewal applicants for EA Grants are awarded first as long as all criteria specified in I. below are met; then

   b. remaining funds are awarded to all other eligible applicants until all funds are deleted. Students are selected based on a statewide ranking of student's Total Family Contribution (TFC) and need, with the lowest TFC's and greatest need awarded first.

H. AWARD NOTIFICATION

Recipients are notified in writing of their award. In order to accept an award, GA and EA Grant recipients must provide written acceptance of the award and submit any other required documentation.

I. RENEWAL AND CONTINUATION

1. An Educational Assistance Grant may be renewed if the recipient:

    a. files a FAFSA by the March 1 deadline;

    b. demonstrates financial need;

    c. is enrolled in an eligible institution;

    d. is enrolled as a full-time student (or the equivalent) for each semester;

    e. is making satisfactory progress according to institution standards in compliance with federal Title IV program regulations; and

    f. is a resident of the State of Maryland.

2. A Guaranteed Access Grant may be renewed if the recipient:

    a. files a FAFSA;

    b. has an annual family income below 150% of the federal poverty level as reported on the FAFSA;

    c. is enrolled in an eligible institution;

    d. is enrolled as a full-time student (or the equivalent) for each semester;

    e. is making satisfactory progress according to institution standards in compliance with federal Title IV program regulations; and

    f. is a resident of the State of Maryland.

~~In addition, GA grant recipients will continue to receive an award if their total annual family income remains at or below 150% of the federal poverty level.~~ Recipients who no longer meet this requirement will be considered eligible for an EA Grant, as long as all other conditions described above are met.

J. CANCELLATION OF AWARD

An award will be canceled:

1. if the recipient fails to sign and return the award letter (along with any additional documentation requested by ~~SSA~~ OSFA) within the time specified in the letter;

2. if the recipient fails to pass verification requirements or;

3. if the institution reports on the billing roster that the recipient is not:

   a. enrolled at that institution in a regular under-graduate program;

   b. enrolled as a full-time undergraduate;

   c. making satisfactory academic progress;

   d. a resident of the State of Maryland; or

   e. is in default for a Title IV loan or owes a refund of Title IV assistance.

K. PAYMENT

Payment is made to the institution for each semester that the recipient is attending. At the beginning of each semester, institutions will be asked to review billing rosters provided by ~~SSA~~ OSFA to certify that the recipient meets the requirements specified under J.3.

Institutions are responsible for disbursing the funds to eligible students in a timely fashion.

L. VERIFICATION

~~SSA~~ OSFA annually verifies application information for a percentage of all new Educational Excellence Award recipients to determine if students are submitting accurate information for determining their awards. ~~SSA~~ OSFA verifies Educational Excellence Award applications of recipients identified by ~~SSA~~ OSFA and institutions as having severe discrepancies in the information contained on their FAFSA or misreported dependency status or Maryland residency and ~~SSA~~ OSFA may also select students randomly for verification. Selected recipients are required to provide documentation of financial data and to verify Maryland residency.

Students are notified in writing of their selection for verification and are requested to provide the following documents within four weeks:

1. A Maryland ~~State Scholarship Administration~~ Office of Student Financial Assistance Dependent or Independent Verification Form to verify:

a. child support;

b. other untaxed income;

c. Maryland residency for non-tax filers;

d. non-filing status for non-tax filers.

2. Federal and state income tax returns of parents, student and spouse, to verify:

a. income, federal taxes paid; and

b. Maryland residency.

Awards for students who fail to provide the requested information by the deadline will be canceled for the entire academic year.

Students who provide the requested documentation will be verified in accordance with the procedures established by ~~SSA~~ OSFA. Awards for students with errors will be recalculated and adjusted as specified in E.3. or canceled accordingly.

M. LATE AWARDS

~~SSA~~ OSFA will consider students for late ~~GA and~~ EA Grants should funds become available after initial awards have been made.

1. Priority for Late Awards

Consideration for a late award will be given in the following descending order to students who:

a. were previously awarded and have requested reinstatement of a canceled award;

b. applied on time and filed appeals based on changes in their financial circumstances;

c. applied on time and were eligible for an award but were not funded ~~(EA grant only)~~;

d. were late in applying, appealed for consideration and were placed on the waiting list ~~(EA grant only)~~; and

e. applied after the deadline ~~(EA grant only)~~.

2. Selection of Recipients

a. Upon determination of the availability of sufficient funds to make late awards, ~~SSA~~ OSFA will fund ~~GA and~~ EA grant recipients in the order described above and notify recipients and institutions.

b. If funds become available after commencement of the Fall semester and are sufficient to award category M.1.e., ~~SSA~~ OSFA will have the eligibility of the students in these two categories certified by the institution before making awards.

N. APPEALS

1. Categories of Appeals

EEA applicants and recipients can appeal their eligibility for an award for the following criteria:

a. EA and GA Grant applicants and recipients:

(1) **be enrolled as a full-time student (or the equivalent):** Students enrolled for less than twelve credits can still be considered eligible for the EEA program if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. Also, the student must be enrolled for a minimum of 6 credit hours. Documentation must be provided as specified in 2.a. below.

(2) **fifth year award:** students may hold an award for a fifth year if, according to the institution, he or she is enrolled in an academic program that requires five years to complete or if the student provides ~~SSA~~ OSFA with evidence of extenuating financial, academic, or other circumstances that prevent the student from completing their academic program in four years. Documentation must be provided as specified in 2.b. below.

(3) **special financial circumstances:** ~~SSA~~ OSFA recognizes that the financial circumstances of students can change dramatically after their applications for need-based scholarships have been filed. In order to assist these students, ~~SSA~~ OSFA will make adjustments with adequate documentation to the family contribution as follows:

(a) the student's parent(s) or spouse dies after submission of the application: the ~~SSA~~ OSFA will adjust FAFSA income information to exclude the income of the parent(s) or spouse affected;

(b) the student or the student's parent's divorce or separate after submission of the application: the ~~SSA~~ OSFA will adjust FAFSA income information to exclude the income of the parent(s) or spouse affected;

(c) the student, student's parent (if dependent) or student's spouse, if married and independent, becomes unemployed for at least ten weeks in the current year: the ~~SSA~~ OSFA will calculate student's family contribution and total family income using an estimated income for the current calendar year.

(d) the student or the student's parent(s) loses, as a result of the student reaching the age of majority, benefits from Social Security, AFDC, or child support: the ~~SSA~~ OSFA will calculate the student's family contribution and total family income using an estimated income for the current calendar year.

To request a change in financial circumstances students must submit documentation specified in 2.c. below.

b. GA applicants and recipients:

(1) **have completed high school with a grade point average of at least 2.5 on a 4.0 scale or its equivalent:** Applicants who fail to meet this requirement because of extenuating circumstances can appeal only after submitting a letter of recommendation from their high school principal. They must provide satisfactory evidence to ~~SSA~~ OSFA of any of the extenuating circumstances as specified in 2.b. below.

(2) **begin college within one year of high school graduation:** Applicants who fail to meet this requirement must provide satisfactory evidence to ~~SSA~~ OSFA of any of the extenuating circumstances as specified in 2.b. below.

(3) **annual family income of GA grant recipients must remain at 150% of the federal poverty level in order to continue receiving the award:** Students who are no longer eligible for the GA program because their annual family incomes rise above the poverty level threshold must provide satisfactory evidence to ~~SSA~~ OSFA of special financial circumstances as specified in N.1.a. (4) above.

2. Appeal Procedures

The recipient must complete an appeal form provided by the ~~Maryland Higher Education Commission~~ Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of an appeal.

a. **full-time equivalency:** If a student is enrolled in a specific course or activity (such as an internship or practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation, which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.

b. **academic requirements:** The following circumstances are considered acceptable as grounds for an appeal:

(1) serious illness or injury of the student;
(2) serious illness of a member of the student's immediate family;
(3) serious personal emotional difficulties of the student;
(4) the death of a member of the student's immediate family; or
(5) other serious personal circumstances.
(6) for fifth year award appeals only, student is enrolled in an academic program that requires 5 years to complete.

The documentation shall be an appeal form accompanied by a statement from an attending physician, psychologist, mental health professional, guidance counselor, social worker, a death certificate, or if the above do not apply, a statement from the Dean of Students or other officer at the student's institution.

c. **special financial circumstances:** Documentation must be an appeal form along with a copy of the deceased's death certificate, separation agreement or divorce decree, notice of job termination or layoff, or copies of termination notices from relevant agencies.

3. Adjustment of Awards

The following adjustment of awards will be made for appeals, which are granted:

a. if an appeal is granted prior to awards being made for the upcoming year, the student's eligibility for an award will be based on the new information;

b. if the student has not been awarded a scholarship and submits the appeal after awards have been made for the upcoming year and the appeal is granted, the student will be placed on the waiting list for an award if the change in circumstances makes that student eligible for an award; or

c. if the student has already been awarded a scholarship and submits an appeal and the appeal is granted, the student will be placed on a waiting list for any additional funds for which they may be eligible due to the outcome of the appeal.

d. if the student's appeal for the 12-credit equivalency has been approved, the student enrolled in 9-11 credits will receive three-quarters of the original award and a student enrolled for 6-9 credits will receive one-half of the original award. No award will be less than the statutory minimum award.

O. CAMPUS-BASED AWARDS

The Commission shall allocate funds to institutions of higher education in the State of Maryland to make awards to students who applied after the March 1st deadline or who have other extenuating circumstances.

1. Funds will be awarded to institutions based on the proportion of full-time Pell eligible Maryland residents enrolled at each institution.

2. These funds shall be awarded by institutions to students who meet the eligibility criteria for EA Grant awards as described in B (1) (a), (c), (d) and (e) but who did not apply by the March 1 deadline or who have other extenuating circumstances. These students must be eligible for a Pell Grant.

3. Awards shall be made in the amounts and the manner described in E. above with the same minimum ($400), maximum (established annually) and percent of need (established annually) and rounded to the nearest $100 increment.

4. The institution may not award a campus-based Educational Assistance Grant to a recipient of a Guaranteed Access or Educational Assistance Grant offered by the Office of Student Financial Assistance. Students may hold other state scholarships or grants but must meet all conditions for all awards and may not receive an amount combined from all State programs that exceeds the maximum amount established in the OSFA General Policies.

5. Each institution of higher education in the State of Maryland that participates in the campus-based Educational Assistance Grant program must submit reports as follows:

   a. January 15th – Fall Semester Awards
   b. June 15th – Spring Semester Awards
   c October 1st – End of Year Report

   The reports should contain the following information on students awarded:

   a. student name;
   b. social security number;
   c. institutional cost of attendance;
   d. Expected Family Contribution;
   e. amount of Pell Grant disbursed
   f. amount of campus-based EA Grant awarded;
   g. Pell I.D. and transaction number from the ISIR used for awarding.

h:st:guidelines:eea
4/17/02 3:55 PM

Parris N. Glendening
Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 9, 2002

TO: Finance Policy Committee

FROM: Karen R. Johnson, J.D. STAFF: Janice Doyle

SUBJECT: Guidelines for the Graduate and Professional Scholarship Program

Senate Bill 453 was passed during the 2002 Maryland Legislative Session. This legislation established the Graduate and Professional Scholarship Program for students at certain institutions in the fields of medicine, veterinary medicine, dentistry, law, pharmacy, social work and nursing to students with financial need.

The legislation includes a minimum $1,000 and a maximum $5,000 award amount and establishes a decentralized computer-based program. Funds will be awarded to the institutions as a proportion of the number of Maryland residents enrolled in the eligible programs. The institutions will make awards to students with financial need and will provide the Commission with an annual report describing the disposition of the funds.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the guidelines for the Graduate and Professional Scholarship Program and forward this recommendation to the Commission.

16 Francis St., Annapolis, MD 21401-1781 • www.mhec.state.md.us
(410)260-4500 • (800)974-0203 • FAX (410) 974 - 5994 • TTY for the Deaf: (800) 735 – 2258

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

GRADUATE AND PROFESSIONAL SCHOLARSHIP PROGRAM

SUBMITTED: JUNE 2002

SUBMITTED: June 2002

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Graduate and Professional Scholarship Program

AUTHORITY

The Graduate and Professional Scholarship Program was enacted into law by the Maryland General Assembly in 2002 (Annotated Code, Educational Article, Section 18-2601). Special funds for the program are provided under Transportation Article, Section 13-613. The Office of Student Financial Assistance has the authority to adopt rules and regulations to administer this program (Annotated Code, Educational Article, Section 18-2601).

A. PURPOSE

The purpose of the Graduate and Professional Scholarship Program is to provide financial assistance to full-time and part-time graduate/professional students in the fields of medicine, dentistry, law, pharmacy, nursing, social work, and veterinary medicine if the applicant has demonstrated financial need.

B. STUDENT ELIGIBILITY

To be eligible for the Graduate and Professional Scholarship Program an individual must:

1. be a Maryland resident;

2. demonstrate financial need; and

3. be enrolled as a degree-seeking student, either part-time or full-time and attend one of the following schools:

    a. University of Maryland, Baltimore (UMB) Schools of Medicine, Dentistry, Law, Pharmacy, or Social Work;

    b. University of Baltimore School of Law;

    c. The Johns Hopkins University School of Medicine;

    d. The Virginia-Maryland Regional College of Veterinary Medicine; or

    d. Any Maryland institution offering a masters degree in Nursing.

C. INSTITUTIONAL ELIGIBILITY

Institutions eligible to participate in the program are: University of Maryland, Baltimore, University of Baltimore, The Johns Hopkins University, Virginia-Maryland Regional College of Veterinary Medicine, and any institution of higher education in the State offering a Master's Degree in Nursing.

D. INSTITUTIONAL ALLOCATIONS

The Commission shall allocate to each eligible institution a share of the total funds provided for the program in proportion to its share of Maryland graduate and professional students who are enrolled in the eligible programs as reported to the Commission.

The allocation shall be based on the average of the enrollments for the prior two years. Institutions will be notified by May 1 of the amount of their allocation and funds will be distributed to each institution after July 1.

E. STUDENT AWARDS

The institutional financial aid office will identify students who are eligible for an award.

The minimum award is $1,000 per academic year and the maximum award is $5,000 per academic year. No student may receive the award for longer than eight semesters regardless of enrollment status.

Awards shall be based on the financial need of the student. Students are required to file the Free Application for Federal Student Aid (FAFSA). Each institution may determine an appropriate methodology for determining financial need; this methodology should include consideration of the information provided on the FAFSA.

The award may be used toward the costs of tuition and mandatory fees, room and board, and other educational expenses.

F. RENEWAL CONDITIONS

To maintain eligibility for a Graduate and Professional Scholarship, the recipient must continue to demonstrate financial need for each year that the award is sought and meet all other eligibility criteria. A student may receive the award for a maximum of eight semesters, regardless of full or part-time status.

G. AUDIT

Each participating institution must submit to the Commission by October 15 each year the following information:

1. amount of funds and number of recipients awarded a Graduate and Professional Scholarship;

2. the allocation of awards and funds by each degree program;

3. total number of eligible students with financial need; and

4. the methodology used to determine the financial need of the students awarded under the program.

All financial books, records and documents pertaining to this grant shall, at all reasonable times, be opened to inspection, review and audit by the Commission, the State Auditor or their authorized representatives. The institution shall retain such financial books, records, and documents for 5 years after close of fiscal year.

Institutions are required to include this program in any independent audit conducted for the institution on financial aid programs.

H:st:guidelines:grad/prof
4/22/02 10:01 AM