



UTAH SYSTEM OF
HIGHER EDUCATION

MEMORANDUM

TAB AA

May 20, 2022

State Aid Program Policy Revisions

The attached proposed policy revisions are part of the Board's efforts to streamline and simplify state aid programs. In 2021, the Legislature passed SB 136, which transitions the Regents' Scholarship to the Opportunity Scholarship. The Utah Legislature passed H.B. 355, State Scholarship Revisions, during the 2022 Legislative Session as a companion follow-up.

The objectives for these changes are:

1. Simplify requirements for students/parents to navigate state aid programs.
2. Improve standardized reporting to better measure the impact of different programs.
3. Greater efficiency in administering state aid programs.
4. Flexibility to allow institutions to best support individual student needs.

These legislative efforts warrant several accompanying policy revisions and additions, including a new scholarship program to assist USHE employees pursuing an education at another USHE institution.

Below is a summary of the proposed policy changes:

R604 – New Century Scholarship: Directs any leftover funds to be used for the Utah Promise Grant Program.

R606 – USHE Employee Partner Scholarship: New policy establishing a scholarship for up to 50% of tuition and fees for USHE employees who attend another USHE institution pursuing a certificate, degree, or other credential related to their job duties.

R608 – Opportunity Scholarship: Clarifies application criteria.

R613 – Public Safety Officer Career Advancement Program: Adds a sunset date and provision to hold harmless previous applicants if they apply under the new program (R614).

R614 – Public Safety Officer Career Advancement Grant: Establishes a grant program to replace the previous reimbursement program (R613).

R615 – Talent Development Incentive Loan Program: Adds a sunset date and provision to hold harmless previous applicants if they apply under the new program (R619).

R619 – Talent Development Award Program: Establishes a grant program to replace the previous reimbursement program (R615). The policy requires institutions to establish criteria to assess applicants' needs and allow part-time students to qualify for an award.

R620 – Utah Promise Grant: Combines the existing Higher Education Success Stipend with the Utah Promise Scholarship. The revisions simplify applicant criteria, clarify the procedures for when a student transfers, and allow award funds to be applied to a recipient's total cost of attendance.

R621 – TH Bell Scholarship: Clarifies definitions and reporting requirements.

R623 – Free Application for Federal Student Aid: Removes reference to state statute.

R624 – Utah Promise Partners Program: New policy to define how identified industry partners can contribute financial support to the Promise Grant program.

Commissioner's Recommendation

The above policies are being proposed either in accordance with changes in HB 355 or to collectively align state aid programs more closely with the Board of Higher Education's Strategic Objectives. The Commissioner recommends all policy changes be considered and approved as a single motion.

Attachments

R604, New Century Scholarship¹

R604-1 Purpose: The New Century Scholarship encourages students to accelerate their education by earning an ~~A~~associate's degree in high school from an institution within the Utah System of Higher Education (["USHE"](#)).

R604-2 References

- 2.1 [Utah Code § 53B-8-105](#), New Century Scholarships
- 2.2 [Utah Code § 53B-8-201](#), Opportunity Scholarship Program
- 2.3 [Utah Code Title 53B Chapter 8 Part 2](#), Regents' Scholarship Program
- 2.4 [Board Policy R609A](#), Regents' Scholarship

R604-3 Definitions

- 3.1 **"Applicant"**: ~~is~~ [means](#) a student who is in their last term in high school and on track to complete the high school graduation requirements of a public school established by the Utah State Board of Education and the student's school district or charter school or a private high school in the state that is accredited by a regional accrediting body approved by the [Board](#), ~~Board of Higher Education~~, or a home-school student.
- 3.2 **"Associate Degree"**: [means](#) ~~A~~an Associate of Arts, Associate of Science, or Associate of Applied Science degree received from, or verified by, a regionally accredited institution within ~~the Utah System of Higher Education~~ [USHE](#). If the institution does not offer the above listed degrees, equivalent academic requirements will suffice under subsection 3.5.2 of this policy.
- 3.3 **"Awards"**: [means](#) New Century Scholarship funds.
- 3.4 **"[Utah Board of Higher Education – Board](#)"**: [means](#) ~~T~~the Utah Board of Higher Education.
- 3.5 **"Completes the requirements for an associate degree"**: ~~M~~[means](#) that an applicant completes either of the following:

¹ [Adopted June 4, 1999, amended July 12, 1999, April 20, 2001, May 31, 2002, September 15, 2006, October 16, 2009, April 1, 2010, March 25, 2011, March 29, 2013, April 1, 2016, May 17, 2019.](#)

3.5.1. ~~a~~ All the required courses for an associate degree from an institution within ~~the Utah System of Higher Education~~ [USHE](#) that offers ~~A~~ associate's degrees; and applies for the ~~A~~ associate's degree from the institution; or

3.5.2. ~~a~~ All the required courses for an equivalency to the associate degree from a higher education institution within ~~the Utah System of Higher Education~~ [USHE](#) that offers Baccalaureate degrees but does not offer ~~A~~ associate's degrees.*

3.6. **“Excusable Neglect”** means a failure to take proper steps at the proper time, not in consequence of carelessness, inattention, or willful disregard in the processing of an appeal, but in consequence of some unexpected or unavoidable hindrance or accident.

3.7. **“Good Cause”** means the student's failure to meet a scholarship application process requirement was due to circumstances beyond the student's control or circumstances that are compelling and reasonable.

3.8. **“High school”** ~~means~~ a public high school established by the ~~Utah State Board of Education~~ [Board](#) or private high school within the boundaries of the State of Utah. If a private high school, it shall be accredited by a regional accrediting body approved by the Board.

3.9. **“High school graduation date”** ~~means~~ the day on which the recipient's class graduates from high school. For home-schooled student refer to subsection 4.2.1 of this policy.

3.10. **“Home-schooled”** ~~refers~~ to a student who has not graduated from a Utah high school and received a high school grade point average (GPA).

3.11. **“Math and science curriculum”** ~~means~~ the rigorous math and science curriculum developed and approved by the Board which, if completed, qualifies a high school student for an award. Curriculum requirements can be found ~~on at the website of the Utah System of Higher Education~~ [USHE's website at ushe.edu](#).

3.12. **“New Century Scholarship”** ~~means~~ a renewable scholarship to be awarded to applicants who complete the eligibility requirements of section ~~604~~ 4 of this policy.

3.13. **“Reasonable progress”** ~~means~~ enrolling and completing at least twelve credit hours during Fall and Spring semesters and earning a 3.3 GPA or higher each semester. If applicable, students attending summer must enroll full-time according to their institution and or program policy regarding full-time status.

3.14. **“Recipient”** ~~means~~ an applicant who receives an award under the requirements set forth in this policy.

3.15. **“Renewal Documents”** ~~means~~ a college transcript demonstrating that the recipient has met the required semester GPA and a detailed schedule

providing proof of enrollment in twelve credit hours for the semester which the recipient is seeking award payment.

3.16. “Scholarship Appeals Committee” means the committee designated by Commissioner of Higher Education to review appeals of Regents’ Scholarship award decisions and take final agency action regarding awards.

3.17. “Scholarship Staff” means the group assigned to review Regents’ Scholarship applications and make decisions awarding the scholarships and deferments.

3.18. “Substantial Compliance” means the applicant, in good faith, complied with the substantial or essential scholarship application requirements and has demonstrated likely eligibility but failed to comply exactly with the application specifics.

3.19. “The Utah System of Higher Education – USHE” means the Utah System of Higher Education, which includes the University of Utah, Utah State University, Weber State University, Southern Utah University, Snow College, Dixie State University, Utah Valley University, and Salt Lake Community College.

R604-4. Recipient Requirements: This section enumerates the requirements to qualify as a recipient. Subsection 4.1. creates the general academic requirements. Subsections 4.2 and 4.3 clarify the exceptions and requirements specific for home-schooled students and students whose graduation date occurs in 2010 or before. ~~Subsections 4.4. through 4.7. establish other generally applicable requirements.~~

4.1. General Academic Requirements: Unless an exception applies, to qualify as a recipient a student shall:

4.1.1. ~~C~~omplete the requirements for an associate degree** or the math and science curriculum at a regionally accredited institution within ~~the Utah System of Higher Education~~ USHE.

4.1.1.1. ~~w~~With at least a 3.0 grade point average

4.1.1.2. ~~b~~By the applicant’s high school graduation date; and

4.1.2. ~~e~~Complete the high school graduation requirements of a Utah high school with at least a 3.5 cumulative GPA.

4.2. Utah Home-schooled Students: For Utah home-schooled applicants the following exceptions and requirements apply:

4.2.1. High School Graduation Date for Home-schooled Applicants:

4.2.1.1. Completes High School in 2011 and After: If a home-schooled applicant would have completed high school in 2011 or

after, the high school graduation date (under subsection 4.1.1.2-) is June 15 of the year the applicant would have completed high school;

4.2.2- ACT Composite Score Requirement: A composite ACT score of 26 or higher is required in place of the high school GPA (under subsection 4.1.2).

4.3- Mandatory Fall Term Enrollment: A recipient shall enroll in an eligible institution by fall semester immediately following the student's high school graduation date or receive an approved deferral or leave of absence under subsection 8.7 of this policy.

~~**4.4- Citizenship Requirement:** A recipient shall certify under penalty of law they are a citizen of the United States or a noncitizen who is eligible to receive federal student aid.~~

~~**4.5- Regents' Scholarship:** A recipient shall not receive both New Century and a Regents' Scholarship.~~

R604-5 Application Procedures: This section establishes the basic application procedures for an award.

5.1- Application Contact: Qualifying students shall apply for the award through the Board.

5.2- General Procedure: An application for an award shall contain the following:

5.2.1- Application Form: the official online application will become available on the New Century website.

5.2.2- College Transcript: an official college transcript showing college courses, Advanced Placement and transfer work an applicant has completed to meet the requirements for the associate degree and verification of the date the award was earned; and

5.2.3- High School Transcript: an official high school transcript with high school graduation dated posted (if applicable).

5.2.4. ACT Score: a copy of the student's verified ACT score (if applicable).

5.3- Registrar Verification: If an applicant is enrolled at an institution which does not offer an associate degree or an institution that will not award the associate degree until the academic on-campus residency requirement has been met, the registrar must verify that the applicant has completed the equivalent academic requirements under 4.1.1.

5.4- Application Deadline: Applicants shall meet the following deadlines:

5.4.1. Application Submission: Applicants must submit the official scholarship application no later than February 1 of the year of their high school graduation date or the year they would have graduated from high school.

5.4.2. Support Documentation Submission: All necessary support documentation shall be submitted on or before September 1 following the student's high school graduation date. In some cases, exceptions may be made as advanced placement and transfer work verification may be delayed at an institutional level and no fault of the applicant. Scholarship awards may be denied if all documentation is not complete and submitted by the specified deadlines. And if any documentation demonstrates that the applicant did not satisfactorily fulfill all coursework and GPA requirements, or if any information, including the attestation of criminal record and citizenship status, proves to be falsified.

5.4.3. Priority Deadline: A priority deadline may be established each year. Applicants who meet the priority deadline may be given first priority of consideration for awards.

5.5. Incomplete Documentation: Applications or other submissions that have missing information or missing documents are considered incomplete, will not be considered, and may result in failure to meet a deadline.

R604-6 Awards: This section establishes the total value of an award, the power of the Board to change that value, and the eligible institutions where the award may be used.

6.1. Value of the Award: The award is up to the amount provided by the law and determined each Spring by the Board based on legislative funding and number of applicants. The total value may change in accordance with subsection 6.2.

6.2. The Board May Decrease Award: If the appropriation from the Utah Legislature for the scholarship is insufficient to cover the costs associated with the scholarship, the Board may reduce or limit the award.

6.3. Eligible Institutions: An award may be used at the following institutions:

6.3.1. For recipients whose high school graduation date is on or before July 1, 2019, award funds may be used at a four-year institution within ~~the Utah System of Higher Education~~ [USHE](#) that offers Baccalaureate programs or a private not-for-profit higher education four-year institution in the state of Utah accredited by the Northwest Commission on Colleges and Universities that offers Baccalaureate programs.

6.3.2. For recipients whose high school graduation date is after July 1, 2019, funds may be used at a four-year institution within ~~the Utah System of Higher Education~~ [USHE](#) that offers Baccalaureate programs.

6.4. Enrollment at Multiple Institutions: The award may only be used at the institution from which the student is earning a Baccalaureate degree.

6.5. Student Transfer: The award may be transferred to a different eligible institution upon the request of the recipient.

6.6 Limits: A recipient cannot receive both a New Century and a ~~an Opportunity Scholarship or~~ Regents' Scholarship.

R604-7 Disbursement of Award: This section details the disbursement of the award amounts.

7.1. Disbursement Schedule of Award: The award shall be disbursed semester-by-semester over the shortest of the following time periods:

7.1.1. Four semesters of enrollment in twelve credit hours;

7.1.2. ~~s~~Sixty credit hours; or

7.1.3. ~~u~~Until the recipient meets the requirements for a baccalaureate degree.

7.2. Enrollment Documentation: Institutions shall verify the recipient has met the requirements outlined in R604-8. Recipients who do not maintain eligibility may forfeit the remaining award amount.

7.3. Dropped Hours after Award: If a recipient drops credit hours after having received the award which results in enrollment below twelve credit hours, the scholarship will be revoked and the student may no longer be eligible for future awards (see 8.1) unless the student needs fewer than twelve credit hours for completion of a degree.

R604-8 Excess Appropriations: If money appropriated for this scholarship is available after all scholarship under this policy have been awarded, the Board shall use the leftover money for the Utah Promise Program Grant under Board Policy R620.

R604-~~9~~8. Continuing Eligibility: This section establishes the expectations of recipients to renew their award.

~~9~~8.1. Reasonable Progress Toward Degree Completion: The Board may cancel a recipient's scholarship if the student fails to:

~~9~~8.1.1. Maintain 3.3 GPA: to maintain a 3.3 GPA or higher for each semester for which he or she has received awards; or

~~9~~8.1.2. Reasonable Progress: to make reasonable progress (twelve credit hours) toward the completion of a Baccalaureate degree. A recipient must apply and receive an approved deferral or leave of absence under subsection 8.7 if ~~he or she~~they will not enroll in twelve credit hours continuously for Fall and Spring semesters.

98.2- Probation: If a recipient earns less than a 3.3 GPA in any single semester, the recipient must earn a 3.3 GPA or better the following semester to maintain eligibility for the scholarship. If the recipient again at any time earns less than a 3.3 GPA the scholarship will be revoked.

98.3- Final Semester: A recipient will not be required to enroll in twelve credit hours if the recipient can complete the degree program with fewer credits.

98.4- No Awards after Five Years: The Board will not make an award to a recipient for an academic term that begins more than five years after the recipient's high school graduation date.

98.5- No Guarantee of Degree Completion: An award does not guarantee that the recipient will complete ~~their~~~~his or her~~ Baccalaureate program within the recipient's scholarship eligibility period.

98.6- Deferral or Leave of Absence:

98.6.1- A recipient shall apply to the Board for a deferral. Leave of absence request are reviewed and approved by the institution the student is attending. Student are required to submit deferral and leave of absence request if they do not continuously enroll in fall and spring semester in twelve credit hours.

89.6.2- A deferral or leave of absence will not extend the time limits of the scholarship under subsection 8.5.

89.6.3- Deferrals or leaves of absence may be granted, for military service, humanitarian/religious service, documented medical reasons, and other exigent reasons.

R604-910 Appeals

910.1- Scholarship Determinations: Submission of a scholarship application does not guarantee a scholarship award. The Scholarship Staff shall review individual scholarship applications and make the awards determination. Awards are based on available funding, applicant pool, and applicants' completion of scholarship criteria by the specified deadline.

910.2- Appeals: An applicant has the right to appeal the Scholarship Staff's decision by filing an appeal with the Scholarship Appeals Committee subject to the following conditions:

910.2.1- Appeals must be submitted within 30 days of the date on which the scholarship notification was issued.

910.2.2- In the appeal, the applicant must provide ~~their~~ ~~his or her~~ full name, mailing address, the high school ~~he or she~~~~they~~ last attended, a statement of the reason for the appeal, and all information or evidence

that supports the appeal. The failure of an applicant to provide the information in this subsection shall not preclude the acceptance of an appeal.

910.2.3- An appeal filed before the applicant receives official notification from the Scholarship Staff regarding their application shall not be considered.

910.2.4- If an applicant failed to file ~~his or her~~ their appeal on time, the Scholarship Appeals Committee shall notify the applicant and give him or her an opportunity to show that the appeal was timely or that it was delayed for excusable neglect. If it is found that the appeal was not timely and the delay was without excusable neglect, the Scholarship Appeals Committee shall not have jurisdiction to consider the merits.

910.2.5- The Scholarship Appeals Committee may consider a late appeal on its merits if it determines the appeal was delayed because of excusable neglect.

910.2.6- The Scholarship Appeals Committee shall review the appeal to determine if the award decision was made in error, or if the applicant demonstrated substantial compliance with the scholarship application requirements but failed to meet one or more requirements for good cause.

910.2.7- If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that the initial decision was made in error, it shall either reverse the initial decision or remand it back to the Scholarship Staff for further review in accordance with the Appeals Committee's instructions.

9.2.8- If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that ~~he or she~~ they demonstrated substantial compliance with the application process requirements and good cause for failing to meet one or more of the requirements, the Appeals Committee shall grant the applicant a reasonable period of time to complete the remaining requirements and to resubmit the completed application to the Scholarship Staff for a redetermination.

910.2.9- The Scholarship Appeals Committee's decision shall be in writing and contain its findings of facts, reasoning and conclusions of law and notice of the right to judicial review.

910.2.10- The Scholarship Appeals Committee's decision represents the final agency action. An applicant who disagrees with the Scholarship Appeal Committee's Decision may seek judicial review in accordance with Utah Code Ann. 63G-4-402.

R609-~~10~~-11 Reporting

~~1011.1.~~ –As directed by Commissioner’s staff, eligible institutions shall report to the Board the following:

~~1011.1.1.~~ –The names of students the institutions awarded New Century Scholarship funds.

~~1011.1.2.~~ –Enrollment information such as the current GPA, the number of credits completed, and deferment or leave of absence information.

~~1011.1.3.~~ Other information deemed necessary to evaluate eligibility or the effectiveness of the program.

~~1011.2.~~ The Board may, at any time, request additional documentation or data related to the Regents’ Scholarship and may review or formally audit an eligible institution’s compliance with this policy.

**Please note the requirement to have the coursework certified by the campus registrar under subsection 5.3 of this policy.*

***Please refer to [subsection 3.5](#) for clarification.*

~~*Adopted June 4, 1999, amended July 12, 1999, April 20, 2001, May 31, 2002, September 15, 2006. Amended and approved on October 16, 2009; April 1, 2010; March 25, 2011; March 29, 2013; April 1, 2016; May 17, 2019; and May 15, 2020; and [XXX](#).*~~

R604, New Century Scholarship¹

R604-1 Purpose: The New Century Scholarship encourages students to accelerate their education by earning an associate degree in high school from an institution within the Utah System of Higher Education (“USHE”).

R604-2 References

- 2.1 [Utah Code § 53B-8-105](#), New Century Scholarships
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- 2.3 [Utah Code Title 53B Chapter 8 Part 2](#), Regents’ Scholarship Program
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- 3.1 **“Applicant”** means a student who is in their last term in high school and on track to complete the high school graduation requirements of a public school established by the Utah State Board of Education and the student’s school district or charter school or a private high school in the state that is accredited by a regional accrediting body approved by the Board, or a home-school student.
- 3.2 **“Associate Degree”** means an Associate of Arts, Associate of Science, or Associate of Applied Science degree received from, or verified by, a regionally accredited institution within USHE. If the institution does not offer the above listed degrees, equivalent academic requirements will suffice under subsection 3.5.2 of this policy.
- 3.3 **“Awards”** means New Century Scholarship funds.
- 3.4 **“Utah Board of Higher Education – Board”** means the Utah Board of Higher Education.
- 3.5 **“Completes the requirements for an associate degree”** means that an applicant completes either of the following:

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3.5.1 All the required courses for an associate degree from an institution within USHE that offers associate degrees; and applies for the associate degree from the institution; or

3.5.2 All the required courses for an equivalency to the associate degree from a higher education institution within USHE that offers Baccalaureate degrees but does not offer associate degrees.*

3.6 “Excusable Neglect” means a failure to take proper steps at the proper time, not in consequence of carelessness, inattention, or willful disregard in the processing of an appeal, but in consequence of some unexpected or unavoidable hindrance or accident.

3.7 “Good Cause” means the student’s failure to meet a scholarship application process requirement was due to circumstances beyond the student’s control or circumstances that are compelling and reasonable.

3.8 “High school” means a public high school established by the Board or private high school within the boundaries of the State of Utah. If a private high school, it shall be accredited by a regional accrediting body approved by the Board.

3.9 “High school graduation date” means the day on which the recipient’s class graduates from high school. For home-schooled student refer to subsection 4.2.1 of this policy.

3.10 “Home-schooled” refers to a student who has not graduated from a Utah high school and received a high school grade point average (GPA).

3.11 “Math and science curriculum” means the rigorous math and science curriculum developed and approved by the Board which, if completed, qualifies a high school student for an award. Curriculum requirements can be found on USHE’s website at ushe.edu.

3.12 “New Century Scholarship” means a renewable scholarship to be awarded to applicants who complete the eligibility requirements of section 4 of this policy.

3.13 “Reasonable progress” means enrolling and completing at least twelve credit hours during Fall and Spring semesters and earning a 3.3 GPA or higher each semester. If applicable, students attending summer must enroll full-time according to their institution and or program policy regarding full-time status.

3.14 “Recipient” means an applicant who receives an award under the requirements set forth in this policy.

3.15 “Renewal Documents” means a college transcript demonstrating that the recipient has met the required semester GPA and a detailed schedule providing proof of enrollment in twelve credit hours for the semester which the recipient is seeking award payment.

3.16 “Scholarship Appeals Committee” means the committee designated by Commissioner of Higher Education to review appeals of Regents’ Scholarship award decisions and take final agency action regarding awards.

3.17 “Scholarship Staff” means the group assigned to review Regents’ Scholarship applications and make decisions awarding the scholarships and deferments.

3.18 “Substantial Compliance” means the applicant, in good faith, complied with the substantial or essential scholarship application requirements and has demonstrated likely eligibility but failed to comply exactly with the application specifics.

3.19 “The Utah System of Higher Education – USHE” means the Utah System of Higher Education, which includes the University of Utah, Utah State University, Weber State University, Southern Utah University, Snow College, Dixie State University, Utah Valley University, and Salt Lake Community College.

R604-4 Recipient Requirements: This section enumerates the requirements to qualify as a recipient. Subsection 4.1 creates the general academic requirements. Subsections 4.2 and 4.3 clarify the exceptions and requirements specific for home-schooled students and students whose graduation date occurs in 2010 or before.

4.1 General Academic Requirements: Unless an exception applies, to qualify as a recipient a student shall:

4.1.1 Complete the requirements for an associate degree** or the math and science curriculum at a regionally accredited institution within USHE.

4.1.1.1 With at least a 3.0 grade point average

4.1.1.2 By the applicant’s high school graduation date; and

4.1.2 Complete the high school graduation requirements of a Utah high school with at least a 3.5 cumulative GPA.

4.2 Utah Home-schooled Students: For Utah home-schooled applicants the following exceptions and requirements apply:

4.2.1 High School Graduation Date for Home-schooled Applicants:

4.2.1.1 Completes High School in 2011 and After: If a home-schooled applicant would have completed high school in 2011 or after, the high school graduation date (under subsection 4.1.1.2) is June 15 of the year the applicant would have completed high school;

4.2.2 ACT Composite Score Requirement: A composite ACT score of 26 or higher is required in place of the high school GPA (under subsection 4.1.2).

4.3 Mandatory Fall Term Enrollment: A recipient shall enroll in an eligible institution by fall semester immediately following the student's high school graduation date or receive an approved deferral or leave of absence under subsection 8.7 of this policy.

R604-5 Application Procedures: This section establishes the basic application procedures for an award.

5.1 Application Contact: Qualifying students shall apply for the award through the Board.

5.2 General Procedure: An application for an award shall contain the following:

5.2.1 Application Form: the official online application will become available on the New Century website.

5.2.2 College Transcript: an official college transcript showing college courses, Advanced Placement and transfer work an applicant has completed to meet the requirements for the associate degree and verification of the date the award was earned; and

5.2.3 High School Transcript: an official high school transcript with high school graduation dated posted (if applicable).

5.2.4. ACT Score: a copy of the student's verified ACT score (if applicable).

5.3 Registrar Verification: If an applicant is enrolled at an institution which does not offer an associate degree or an institution that will not award the associate degree until the academic on-campus residency requirement has been met, the registrar must verify that the applicant has completed the equivalent academic requirements under 4.1.1.

5.4 Application Deadline: Applicants shall meet the following deadlines:

5.4.1 Application Submission: Applicants must submit the official scholarship application no later than February 1 of the year of their high school graduation date or the year they would have graduated from high school.

5.4.2 Support Documentation Submission: All necessary support documentation shall be submitted on or before September 1 following the student's high school graduation date. In some cases, exceptions may be made as advanced placement and transfer work verification may be delayed at an institutional level and no fault of the applicant. Scholarship

awards may be denied if all documentation is not complete and submitted by the specified deadlines. And if any documentation demonstrates that the applicant did not satisfactorily fulfill all coursework and GPA requirements, or if any information, including the attestation of criminal record and citizenship status, proves to be falsified.

5.4.3 Priority Deadline: A priority deadline may be established each year. Applicants who meet the priority deadline may be given first priority of consideration for awards.

5.5 Incomplete Documentation: Applications or other submissions that have missing information or missing documents are considered incomplete, will not be considered, and may result in failure to meet a deadline.

R604-6 Awards: This section establishes the total value of an award, the power of the Board to change that value, and the eligible institutions where the award may be used.

6.1 Value of the Award: The award is up to the amount provided by the law and determined each Spring by the Board based on legislative funding and number of applicants. The total value may change in accordance with subsection 6.2.

6.2 The Board May Decrease Award: If the appropriation from the Utah Legislature for the scholarship is insufficient to cover the costs associated with the scholarship, the Board may reduce or limit the award.

6.3 Eligible Institutions: An award may be used at the following institutions:

6.3.1 For recipients whose high school graduation date is on or before July 1, 2019, award funds may be used at a four-year institution within USHE that offers Baccalaureate programs or a private not-for-profit higher education four-year institution in the state of Utah accredited by the Northwest Commission on Colleges and Universities that offers Baccalaureate programs.

6.3.2 For recipients whose high school graduation date is after July 1, 2019, funds may be used at a four-year institution within USHE that offers Baccalaureate programs.

6.4 Enrollment at Multiple Institutions: The award may only be used at the institution from which the student is earning a Baccalaureate degree.

6.5 Student Transfer: The award may be transferred to a different eligible institution upon the request of the recipient.

6.6 Limits: A recipient cannot receive both a New Century and a Regents' Scholarship.

R604-7 Disbursement of Award: This section details the disbursement of the award amounts.

7.1 Disbursement Schedule of Award: The award shall be disbursed semester-by-semester over the shortest of the following time periods:

7.1.1 Four semesters of enrollment in twelve credit hours;

7.1.2 Sixty credit hours; or

7.1.3 Until the recipient meets the requirements for a baccalaureate degree.

7.2. Enrollment Documentation: Institutions shall verify the recipient has met the requirements outlined in R604-8. Recipients who do not maintain eligibility may forfeit the remaining award amount.

7.3 Dropped Hours after Award: If a recipient drops credit hours after having received the award which results in enrollment below twelve credit hours, the scholarship will be revoked and the student may no longer be eligible for future awards (see 8.1) unless the student needs fewer than twelve credit hours for completion of a degree.

R604-8 Excess Appropriations: If money appropriated for this scholarship is available after all scholarship under this policy have been awarded, the Board shall use the leftover money for the Utah Promise Program Grant under Board Policy R620.

R604-9 Continuing Eligibility: This section establishes the expectations of recipients to renew their award.

9.1 Reasonable Progress Toward Degree Completion: The Board may cancel a recipient's scholarship if the student fails to:

9.1.1 Maintain 3.3 GPA: to maintain a 3.3 GPA or higher for each semester for which he or she has received awards; or

9.1.2 Reasonable Progress: to make reasonable progress (twelve credit hours) toward the completion of a Baccalaureate degree. A recipient must apply and receive an approved deferral or leave of absence under subsection 8.7 if they will not enroll in twelve credit hours continuously for Fall and Spring semesters.

9.2 Probation: If a recipient earns less than a 3.3 GPA in any single semester, the recipient must earn a 3.3 GPA or better the following semester to maintain eligibility for the scholarship. If the recipient again at any time earns less than a 3.3 GPA the scholarship will be revoked.

9.3 Final Semester: A recipient will not be required to enroll in twelve credit hours if the recipient can complete the degree program with fewer credits.

9.4 No Awards after Five Years: The Board will not make an award to a recipient for an academic term that begins more than five years after the recipient's high school graduation date.

9.5 No Guarantee of Degree Completion: An award does not guarantee that the recipient will complete their Baccalaureate program within the recipient's scholarship eligibility period.

9.6 Deferral or Leave of Absence:

9.6.1 A recipient shall apply to the Board for a deferral. Leave of absence request are reviewed and approved by the institution the student is attending. Student are required to submit deferral and leave of absence request if they do not continuously enroll in fall and spring semester in twelve credit hours.

9.6.2 A deferral or leave of absence will not extend the time limits of the scholarship under subsection 8.5.

9.6.3 Deferrals or leaves of absence may be granted, for military service, humanitarian/religious service, documented medical reasons, and other exigent reasons.

R604-10 Appeals

10.1 Scholarship Determinations: Submission of a scholarship application does not guarantee a scholarship award. The Scholarship Staff shall review individual scholarship applications and make the awards determination. Awards are based on available funding, applicant pool, and applicants' completion of scholarship criteria by the specified deadline.

10.2 Appeals: An applicant has the right to appeal the Scholarship Staff's decision by filing an appeal with the Scholarship Appeals Committee subject to the following conditions:

10.2.1 Appeals must be submitted within 30 days of the date on which the scholarship notification was issued.

10.2.2 In the appeal, the applicant must provide their full name, mailing address, the high school they last attended, a statement of the reason for the appeal, and all information or evidence that supports the appeal. The failure of an applicant to provide the information in this subsection shall not preclude the acceptance of an appeal.

10.2.3 An appeal filed before the applicant receives official notification from the Scholarship Staff regarding their application shall not be considered.

10.2.4 If an applicant failed to file their appeal on time, the Scholarship Appeals Committee shall notify the applicant and give him or her an

opportunity to show that the appeal was timely or that it was delayed for excusable neglect. If it is found that the appeal was not timely and the delay was without excusable neglect, the Scholarship Appeals Committee shall not have jurisdiction to consider the merits.

10.2.5 The Scholarship Appeals Committee may consider a late appeal on its merits if it determines the appeal was delayed because of excusable neglect.

10.2.6 The Scholarship Appeals Committee shall review the appeal to determine if the award decision was made in error, or if the applicant demonstrated substantial compliance with the scholarship application requirements but failed to meet one or more requirements for good cause.

10.2.7 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that the initial decision was made in error, it shall either reverse the initial decision or remand it back to the Scholarship Staff for further review in accordance with the Appeals Committee's instructions.

9.2.8 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that they demonstrated substantial compliance with the application process requirements and good cause for failing to meet one or more of the requirements, the Appeals Committee shall grant the applicant a reasonable period of time to complete the remaining requirements and to resubmit the completed application to the Scholarship Staff for a redetermination.

10.2.9 The Scholarship Appeals Committee's decision shall be in writing and contain its findings of facts, reasoning and conclusions of law and notice of the right to judicial review.

10.2.10 The Scholarship Appeals Committee's decision represents the final agency action. An applicant who disagrees with the Scholarship Appeal Committee's Decision may seek judicial review in accordance with Utah Code Ann. 63G-4-402.

R609-11 Reporting

11.1 As directed by Commissioner's staff, eligible institutions shall report to the Board the following:

11.1.1 The names of students the institutions awarded New Century Scholarship funds.

11.1.2 Enrollment information such as the current GPA, the number of credits completed, and deferment or leave of absence information.

11.1.3 Other information deemed necessary to evaluate eligibility or the effectiveness of the program.

11.2 The Board may, at any time, request additional documentation or data related to the Regents' Scholarship and may review or formally audit an eligible institution's compliance with this policy.

**Please note the requirement to have the coursework certified by the campus registrar under subsection 5.3 of this policy.*

***Please refer to subsection 3.5 for clarification.*

R606, USHE Employee Partner Scholarship¹

R606-1 Purpose: To allow employees of a Utah System of Higher Education (“USHE”) institution to receive a scholarship to attend another USHE institution.

R-606-2 References

Utah Code § 53B-13a-106(6), Utah Promise Partners

R606-3 Definitions

3.1 “USHE Employee Partner Scholarship” means a scholarship award available to employees of a USHE institution or the Office of the Commissioner of Higher Education (“OCHE”).

3.2 “USHE Employee Scholarship Advisory Committee” (“Committee”) means a committee comprised of representatives appointed by the Commissioner of Higher Education to provide recommendations for awarding scholarships.

3.3 “Fiscal Year” means the calendar year starting July 1, and ending June 30. For degree-granting institutions, this includes Summer, Fall and Spring semesters of the corresponding academic year.

R606-4 Scholarship Award: The Commissioner, or their designee, may award a one-year USHE Employee Partner Scholarship to an individual employed at a USHE institution for up to 50% of tuition and fees if the employee:

4.1 is employed at a USHE institution full-time;

4.2 has been admitted to a USHE institution, and has declared intention to enroll; and

4.3 intends to pursue a program of study leading to a certificate, degree or other credential related to their current job duties.

R606-5 Application Procedures: An eligible employee must submit a scholarship application by May 30 before the fiscal year during which scholarship awards are made.

5.1 Annually, the scholarship application shall be made available to USHE institution Human Resources Directors, or their identified equivalent, who are responsible for notifying USHE employees at their institution about this program.

5.2 Applicants must receive, and include in their application, written approval of a Dean, Assistant Vice-President or equivalent (or any employee more senior) that the applicant’s educational pursuit is related to the applicant’s current job duties.

5.3 Applicants must submit the scholarship application published by OCHE.

R606-6 Scholarship Administration:

¹ *Approved XXX*

6.1 Selection and Award Determination: The Commissioner, or their designee, shall determine the available funds to be applied to this program, the maximum scholarship award amount, and which applicants may receive an award.

6.1.1 When determining scholarship awards under this policy, the Commissioner, or their designee, shall consider recommendations submitted by the USHE Employee Scholarship Advisory Committee.

6.1.2 A scholarship award cannot exceed 50% of tuition and fees during the fiscal year for which the award is made or for the total duration of the program in which the recipient is enrolled, whichever occurs first.

6.1.3 OCHE shall annually transfer award funds to USHE institutions on behalf of recipients.

6.1.4 Institutions shall return any unexpended funds awarded to a recipient during the fiscal year by June 30 of the corresponding fiscal year.

6.2 USHE Employee Scholarship Advisory Committee

6.2.1 Annually, every USHE President shall identify one employee for consideration to serve on the Committee.

6.2.2 Annually, the Commissioner shall appoint up to 6 employees from any USHE institution from nominees identified by USHE presidents to serve on the Committee.

6.2.3 A nominee may not apply for a scholarship award for the year in which she or he serves on the Committee.

6.2.4 The Committee shall recommend to the Commissioner, or their designee, the proportion of scholarship awards to be awarded for any certificate or degree type offered at any USHE institution.

6.2.5 The Committee shall use all available information to inform its recommendation including available funds, programs of study current applicants intend to pursue, programs considered to most advance the skills of current applicants, and the extent current applicants will fulfill the strategic objectives of the Board by receiving an award.

6.2.6 The Committee shall submit its recommendation to the Commissioner, or their designee, by June 30 annually.

R606-7 Continuing Eligibility

7.1 After providing a recipient notice and an opportunity to respond, an institution may rescind a recipient's scholarship if it determines the recipient has not met the following requirements:

7.1.1 Maintaining satisfactory academic progress toward the completion of the recipient's program in accordance with the institution's policies;

7.1.2 Being enrolled at least half-time as determined by the institution;

7.1.3 Maintaining full-time employment at a USHE institution;

7.2 Recipients may reapply for the scholarship annually. Those who received the scholarship during the previous year shall be given priority in the application and award process.

7.3 Recipients may receive a scholarship award for up to 5 consecutive years in a single program, subject to the requirements of this section.

R606-8 Deferment: A recipient may seek deferment of an award in accordance with applicable deferral policies at the eligible institution.

R606-9 Transfers: Recipients may transfer to the same program at another eligible institution and retain the scholarship if they meet all requirements in section R606-. Transfer students are ultimately responsible for communication with financial aid offices at each institution well in advance. Transfer students must maintain full-time employment status at the same institution at which they were employed at the time of application. The receiving institution is responsible to make any adjustments in a recipient's award. Higher cost of tuition and fees at the new institution are subject to available funding in this program at the time of transfer.

R606-10. Reporting.

10.1 As specified by OCHE, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other scholarship information for the most recently completed fiscal year.

10.2 OCHE may, at any time, request additional documentation or data related to the scholarship program and may review or formally audit an institution's documentation and compliance with this policy.

R608, Opportunity Scholarship

R608-1 Purpose: The Opportunity Scholarship encourages students to complete advanced courses in core subject areas [while in high school](#), ~~in order to~~ [make higher education more accessible](#) ~~provide better access to higher education opportunities and~~ to reward students for preparing academically for college.

R608-2 References

2.1 [Utah Code § ~~Section 53B-8-201~~](#), Opportunity Scholarship Program

R608-3 Definitions

3.1 “Advanced Course” means a course offered via concurrent enrollment (CE), advanced placement (AP), or international baccalaureate (IB) and identified by the Utah Board of Education as earning core credit in the required subject area.

3.2 “Board” means the Utah Board of Higher Education.

3.3 “Eligible Institutions” means institutions of higher education listed in Utah Code [S](#)section 53B-2-101(1), or a private, nonprofit college or university in ~~the state~~[Utah](#) that is accredited by the Northwest Commission on Colleges and Universities.

3.4 “Excusable Neglect” means a failure to take proper steps at the proper time, not in consequence of willful disregard of the scholarship application process, but in consequence of some unexpected or unavoidable circumstances.

3.5 “Good Cause” means the applicant’s failure to meet a scholarship application process requirement was due to circumstances beyond the student’s control or circumstances that are compelling and reasonable.

3.6 “High School” means a public school established by the ~~Utah State Board of Education~~ or [a](#) private high school ~~within the boundaries of the State of Utah. If a private high school, it shall be~~ accredited by a regional accrediting body approved by the Board.

3.7 “Scholarship Appeals Committee” means a committee designated by [the](#) Commissioner of Higher Education to review appeals of Opportunity Scholarship award decisions and take final agency action regarding awards.

3.8 “Scholarship Award” means a scholarship awarded to all applicants who meet the eligibility requirements of section 4.

3.9 “Scholarship Staff” means the employees assigned review Opportunity Scholarship applications and make decisions awarding the scholarships.

3.10 “Substantial Compliance” means the applicant, in good faith, demonstrated clear intent to comply with the scholarship application requirements and has demonstrated likely eligibility, but failed to precisely comply with the application specifics.

R608-4 Award Requirements

4.1 To qualify for the Opportunity Scholarship, the applicant shall satisfy the following criteria:

4.1.1 Graduate from a Utah high school with a minimum, non-weighted GPA of 3.3;

4.1.2 Complete one advanced Mathematics course;

4.1.3 Complete one advanced Language Arts course;

4.1.4 Complete one advanced Science course; and;

4.1.5 Complete and submit either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board.

4.1.6 Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for a scholarship under this policy.

4.2 Students who will graduate from a Utah high school in 2022 may alternatively qualify for the Opportunity Scholarship if they satisfy the following criteria:

4.2.1 Graduate from a Utah high school with a minimum, non-weighted GPA of 3.3;

4.2.2 Complete four credits of English;

4.2.3 Complete four credits of math, including one course of advanced math;

4.2.3.1 For purposes of subsection 4.2, advanced math means any of the following courses: pre-calculus, calculus, statistics, AP calculus AB, AP calculus BC, AP statistics, college courses Math 1030 and higher, IB Math SL, HL, and Further Math.

4.2.4 Complete three credits of lab-based biology, chemistry and physics;

4.2.5 Complete two credits of world languages;

4.2.6 Complete three credits of social science; and;

4.2.7 Complete and submit [either](#) the Free Application for Federal Student Aid (FAFSA) [or the scholarship alternative financial form available](#).

4.3 Students who will graduate from a Utah high school in 2022 must apply for the Opportunity Scholarship using the eligibility criteria in either subsection 4.1 or subsection 4.2 exclusively. They may not qualify for the Opportunity Scholarship by mixing courses from both sets of criteria.

4.3.1 The courses listed in subsections 4.1 and 4.2 are not always analogous. Students who will graduate in 2022 should verify the courses they are completing meet the eligibility requirements under the subsection through which they elect to apply.

4.4 A student may satisfy a course requirement through a competency-based assessment provided it is documented for credit on an official transcript.

4.5 Mandatory Enrollment: An award recipient shall enroll at an eligible institution full time—as defined by the institution—beginning with the fall semester after high school graduation. The institution at which the student attends shall verify the recipient has met the enrollment requirements before disbursing payment.

R608-5 Application Procedures

5.1 Application Deadline: Applicants shall submit an official scholarship application no later than February 1 of the year that they graduate from high school. The Board may establish a priority deadline each year. Applicants who meet the priority deadline may be given first priority or consideration for the scholarship. Subject to funding, students may be considered based on the date of they completed and submitted their application. Additional criteria to prioritize awarding may be established by the Board.

5.2 Required Documentation: Applicants shall submit the following documents:

5.2.1 The online Opportunity Scholarship application.

5.2.2 Complete the online Free Application for Federal Student Aid

5.2.3 If there is an error with the student's transcript, a student must work with their high school or district to rectify the information to complete an application.

R608-6 Award Amounts and Ongoing Eligibility

6.1 Award Determination: The Board will determine eligibility criteria and maximum award amounts, based on legislative appropriations and the number of eligible applicants.

6.2 Scholarship Award: Students who meet the eligibility criteria may receive up to a four-semester scholarship award. Institutions shall determine individual recipient award amounts in accordance with Utah Code [Section 53B-8-201\(3\)](#).

6.43 Ongoing Eligibility: If a student receives an award disbursement, the recipient must enroll at an eligible institution full time and maintain satisfactory academic progress as defined by the institution to remain eligible for future disbursements. Institutions shall verify the recipient has met these requirements. Recipients who do not maintain eligibility forfeit any remaining award amount.

R608-7 Time Limitations and Deferrals

7.1 Time Limitation: Scholarship funds are only available to a recipient for five years after their high school graduation date.

7.2 Deferral or Leave of Absence: Recipients who will not enroll as a student shall apply for a deferral or leave of absence with their institution.

7.2.1 An approved deferral or leave of absence will not extend the time limits of the scholarship. The scholarship may only be used for academic semesters that begin within five years after the recipient's high school graduation date.

7.2.2 A recipient who elects to attend a USHE technical college may defer the Opportunity Scholarship during that period of enrollment subject to the time limitations of [Subsection 7.2.12](#).

R608-8 Transfers

8.1 Recipients may transfer to another eligible institution and retain the scholarship award. Recipients shall inform the institution from which they transfer from and the institution to which they are transferring of their intent to transfer. Institutions shall coordinate the transfer of scholarship funds and information and report this information to the Office of the Commissioner.

R608-9 Appeals

9.1 An applicant has the right to appeal an adverse decision. When [a Scholarship Staff](#) denies eligibility, they shall issue a written determination that includes instructions on how to file an appeal.

9.1.1 Applicants must submit a written appeal [to the Appeal Committee](#) within 30 days of the date on which the scholarship notification was issued.

9.1.2 In the appeal, the applicant must provide contact information, high school attended, a statement of the reason for the appeal, and all information or evidence that supports the appeal.

9.1.3 An appeal filed before the applicant receives official notification from the Scholarship Staff of its decision may not be considered.

9.1.4 If an applicant failed to file ~~his or her~~[their](#) appeal on time, the Scholarship Appeals Committee shall notify the applicant of the late filing and give him or her an opportunity to provide a written explanation of the reasons for failing to file the appeal by the deadline. The Scholarship Appeals Committee shall not have jurisdiction to consider the merits of an appeal that is filed beyond the deadline unless it determines the applicant established excusable neglect.

9.1.5 The Scholarship Appeals Committee shall review the appeal to determine if the award decision was made in error, or if the applicant demonstrated substantial compliance with the scholarship application requirements but failed to meet one or more requirements for good cause.

9.1.6 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that the initial decision was made in error, it shall either reverse the initial decision or remand it back to the Scholarship Staff for further review in accordance with the Appeals Committee's instructions.

9.1.7 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that ~~he or she~~[they](#) demonstrated substantial compliance with the application process requirements and good cause for failing to meet one or more of the requirements, the Appeals Committee may grant the applicant a reasonable period of time to complete the remaining requirements and to resubmit the completed application to the Scholarship Staff for a redetermination or grant the application eligibility for an award.

9.1.8 The Scholarship Appeals Committee's decision shall be in writing and contain its findings of facts, reasoning and conclusions of law and notice of the right to judicial review.

9.1.9 The Scholarship Appeals Committee's decision represents the final agency action. An applicant who disagrees with the Scholarship Appeal Committee's Decision may seek judicial review in accordance with Utah Code Ann. 63G-4-402.

R608-10 Administrative Costs: The Board may use up to 3% of the money appropriated for the Opportunity Scholarship program to cover administrative costs and overhead.

R608-11 Reporting

11.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other technical education scholarship information for the most recently-completed fiscal year.

11.2. The Office of the Commissioner or the Board may, at any time, request additional documentation or data related to the Opportunity Scholarship Program and may review or formally audit an institution's documentation and compliance with this policy.

~~**110.1.** As directed by Commissioner's staff, eligible institutions shall report to the Board the following:~~

~~**110.1.1** The names of students the institutions awarded Opportunity Scholarship funds.~~

~~**110.1.2** Enrollment information such as the current GPA, the number of credits completed, and deferment or leave of absence information.~~

~~**110.1.3** Other information deemed necessary to evaluate eligibility or the effectiveness of the program.~~

~~**110.2.** The Board may, at any time, request additional documentation or data related to the Opportunity Scholarship and may review or formally audit an eligible institution's compliance with this policy.~~

R608, Opportunity Scholarship¹

R608-1 Purpose: The Opportunity Scholarship encourages students to complete advanced courses in core subject areas while in high school, to make higher education more accessible and to reward students for preparing academically for college.

R608-2 References

2.1 [Utah Code § 53B-8-201](#), Opportunity Scholarship Program

R608-3 Definitions

3.1 “Advanced Course” means a course offered via concurrent enrollment (CE), advanced placement (AP), or international baccalaureate (IB) and identified by the Utah Board of Education as earning core credit in the required subject area.

3.2 “Board” means the Utah Board of Higher Education.

3.3 “Eligible Institutions” means institutions of higher education listed in Utah Code section 53B-2-101(1), or a private, nonprofit college or university in Utah that is accredited by the Northwest Commission on Colleges and Universities.

3.4 “Excusable Neglect” means a failure to take proper steps at the proper time, not in consequence of willful disregard of the scholarship application process, but in consequence of some unexpected or unavoidable circumstances.

3.5 “Good Cause” means the applicant’s failure to meet a scholarship application process requirement was due to circumstances beyond the student’s control or circumstances that are compelling and reasonable.

3.6 “High School” means a public school established by the Board or a private high school accredited by a regional accrediting body approved by the Board.

3.7 “Scholarship Appeals Committee” means a committee designated by the Commissioner of Higher Education to review appeals of Opportunity Scholarship award decisions and take final agency action regarding awards.

3.8 “Scholarship Award” means a scholarship awarded to all applicants who meet the eligibility requirements of section 4.

¹ Adopted by the UHEAA Board of Directors July 11, 2001, amended October 1, 2001 and June 20, 2002. Amended to a “scholarship” program in the 2009 Legislative General Session; approved by the Regents May 29, 2009.

¹ The 2009 Legislative General Session SB 105 amended Utah Code 53B-6-105.7 changing the loan forgiveness program to a scholarship program.

3.9 “Scholarship Staff” means the employees assigned review Opportunity Scholarship applications and make decisions awarding the scholarships.

3.10 “Substantial Compliance” means the applicant, in good faith, demonstrated clear intent to comply with the scholarship application requirements and has demonstrated likely eligibility, but failed to precisely comply with the application specifics.

R608-4 Award Requirements

4.1 To qualify for the Opportunity Scholarship, the applicant shall satisfy the following criteria:

4.1.1 Graduate from a Utah high school with a minimum, non-weighted GPA of 3.3;

4.1.2 Complete one advanced Mathematics course;

4.1.3 Complete one advanced Language Arts course;

4.1.4 Complete one advanced Science course; and

4.1.5 Complete and submit either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board.

4.1.6 Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for a scholarship under this policy.

4.2 Students who will graduate from a Utah high school in 2022 may alternatively qualify for the Opportunity Scholarship if they satisfy the following criteria:

4.2.1 Graduate from a Utah high school with a minimum, non-weighted GPA of 3.3;

4.2.2 Complete four credits of English;

4.2.3 Complete four credits of math, including one course of advanced math;

4.2.3.1 For purposes of subsection 4.2, advanced math means any of the following courses: pre-calculus, calculus, statistics, AP calculus AB, AP calculus BC, AP statistics, college courses Math 1030 and higher, IB Math SL, HL, and Further Math.

4.2.4 Complete three credits of lab-based biology, chemistry and physics;

4.2.5 Complete two credits of world languages;

4.2.6 Complete three credits of social science; and

4.2.7 Complete and submit either the Free Application for Federal Student Aid (FAFSA) or the scholarship alternative financial form available.

4.3 Students who will graduate from a Utah high school in 2022 must apply for the Opportunity Scholarship using the eligibility criteria in either subsection 4.1 or subsection 4.2 exclusively. They may not qualify for the Opportunity Scholarship by mixing courses from both sets of criteria.

4.3.1 The courses listed in subsections 4.1 and 4.2 are not always analogous. Students who will graduate in 2022 should verify the courses they are completing meet the eligibility requirements under the subsection through which they elect to apply.

4.4 A student may satisfy a course requirement through a competency-based assessment provided it is documented for credit on an official transcript.

4.5 Mandatory Enrollment: An award recipient shall enroll at an eligible institution full time—as defined by the institution—beginning with the fall semester after high school graduation. The institution at which the student attends shall verify the recipient has met the enrollment requirements before disbursing payment.

R608-5 Application Procedures

5.1 Application Deadline: Applicants shall submit an official scholarship application no later than February 1 of the year that they graduate from high school. The Board may establish a priority deadline each year. Applicants who meet the priority deadline may be given first priority or consideration for the scholarship. Subject to funding, students may be considered based on the date of they completed and submitted their application. Additional criteria to prioritize awarding may be established by the Board.

5.2 Required Documentation: Applicants shall submit the following documents:

5.2.1 The online Opportunity Scholarship application.

5.2.2 Complete the online Free Application for Federal Student Aid

5.2.3 If there is an error with the student's transcript, a student must work with their high school or district to rectify the information to complete an application.

R608-6 Award Amounts and Ongoing Eligibility

6.1 Award Determination: The Board will determine eligibility criteria and maximum award amounts, based on legislative appropriations and the number of eligible applicants.

6.2 Scholarship Award: Students who meets the eligibility criteria may receive up to a four-semester scholarship award. Institutions shall determine individual recipient award amounts in accordance with Utah Code section 53B-8-201(3).

6.4 Ongoing Eligibility: If a student receives an award disbursement, the recipient must enroll at an eligible institution full time and maintain satisfactory academic progress as defined by the institution to remain eligible for future disbursements. Institutions shall verify the recipient has met these requirements. Recipients who do not maintain eligibility forfeit any remaining award amount.

R608-7 Time Limitations and Deferrals

7.1 Time Limitation: Scholarship funds are only available to a recipient for five years after their high school graduation date.

7.2 Deferral or Leave of Absence: Recipients who will not enroll as a student shall apply for a deferral or leave of absence with their institution.

7.2.1 An approved deferral or leave of absence will not extend the time limits of the scholarship. The scholarship may only be used for academic semesters that begin within five years after the recipient's high school graduation date.

7.2.2 A recipient who elects to attend a USHE technical college may defer the Opportunity Scholarship during that period of enrollment subject to the time limitations of subsection 7.2.1.

R608-8 Transfers

8.1 Recipients may transfer to another eligible institution and retain the scholarship award. Recipients shall inform the institution from which they transfer from and the institution to which they are transferring of their intent to transfer. Institutions shall coordinate the transfer of scholarship funds and information and report this information to the Office of the Commissioner.

R608-9 Appeals

9.1 An applicant has the right to appeal an adverse decision. When Scholarship Staff denies eligibility, they shall issue a written determination that includes instructions on how to file an appeal.

9.1.1 Applicants must submit a written appeal to the Appeal Committee within 30 days of the date on which the scholarship notification was issued.

9.1.2 In the appeal, the applicant must provide contact information, high school attended, a statement of the reason for the appeal, and all information or evidence that supports the appeal.

9.1.3 An appeal filed before the applicant receives official notification from the Scholarship Staff of its decision may not be considered.

9.1.4 If an applicant failed to file their appeal on time, the Scholarship Appeals Committee shall notify the applicant of the late filing and give him or her an opportunity to provide a written explanation of the reasons for failing to file the appeal by the deadline. The Scholarship Appeals Committee shall not have jurisdiction to consider the merits of an appeal that is filed beyond the deadline unless it determines the applicant established excusable neglect.

9.1.5 The Scholarship Appeals Committee shall review the appeal to determine if the award decision was made in error, or if the applicant demonstrated substantial compliance with the scholarship application requirements but failed to meet one or more requirements for good cause.

9.1.6 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that the initial decision was made in error, it shall either reverse the initial decision or remand it back to the Scholarship Staff for further review in accordance with the Appeals Committee's instructions.

9.1.7 If the Scholarship Appeals Committee determines the applicant has shown by a preponderance of the evidence that they demonstrated substantial compliance with the application process requirements and good cause for failing to meet one or more of the requirements, the Appeals Committee may grant the applicant a reasonable period of time to complete the remaining requirements and to resubmit the completed application to the Scholarship Staff for a redetermination or grant the application eligibility for an award.

9.1.8 The Scholarship Appeals Committee's decision shall be in writing and contain its findings of facts, reasoning and conclusions of law and notice of the right to judicial review.

9.1.9 The Scholarship Appeals Committee's decision represents the final agency action. An applicant who disagrees with the Scholarship Appeal Committee's Decision may seek judicial review in accordance with Utah Code Ann. 63G-4-402.

R608-10 Administrative Costs: The Board may use up to 3% of the money appropriated for the Opportunity Scholarship program to cover administrative costs and overhead.

R608-11 Reporting

11.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other technical education scholarship information for the most recently-completed fiscal year.

11.2. The Office of the Commissioner or the Board may, at any time, request additional documentation or data related to the Opportunity Scholarship Program and may review or formally audit an institution's documentation and compliance with this policy.

R613, Public Safety Officer Career Advancement Reimbursement Program (PSOCAR)¹

R613-1. Purpose: PSOCAR is a state-funded tuition reimbursement program for certified peace officers enrolled in criminal justice related programs at a credit-granting institution in the Utah System of Higher Education ~~or the Utah System of Technical Colleges~~ (“Institution”).

R613-2. References

2.1. ~~Utah Code §53B-1-102.~~ [Utah Code § 53B-1-102, Utah System of Higher Education](#)

2.2. ~~Utah Code §53B-8-112-13.~~ [Utah Code § 53B-8-112, Public Safety Officer Career Advancement Reimbursement Program \(eff. August 31, 2020\)](#)

2.3. ~~Utah Code §63G-4-202.~~ [Utah Code § 63G-4-202, Designation of Adjudicative Proceedings as Informal](#)

R613-3 Program Sunsetting: [Due to amendments made to Utah Code section 53B-8-112 in the 2022 legislative session, this policy and reimbursements made under it shall sunset on June 30, 2024. Beginning July 1, 2022, qualified peace officers, including those who were previously denied reimbursement based on lack of funding or who have received reimbursement under this policy, may seek grants for tuition under Board policy R614.](#)

R613-~~43.~~ Application Process

~~34.1.~~ Qualified applicants may be reimbursed up to half the cost of tuition and fees with a maximum of \$5,000 per year, subject to funding. If the total applicant awards exceed available funding in any given year, the Board will reduce reimbursement amounts evenly across all qualified applicants, provided that the minimum amounts designated by statute for particular rural counties are first met. A student may participate in PSOCAR for a maximum of eight academic years.

~~34.2.~~ To qualify, applicants must be:

~~34.2.1.~~ a certified peace officer, currently employed by a law enforcement agency in Utah;

¹ Approved May 19, 2017; amended January 19, 2018, XXX

~~34.2.2.~~ employed by a law enforcement agency in Utah as a certified peace officer for three consecutive years prior to the completion of the academic year for which ~~he or she is~~ they are seeking reimbursement;

~~34.2.3.~~ seeking a post-secondary degree in the area of criminal justice from a credit-granting institution in the Utah System of Higher Education ("USHE") ~~or the Utah System of Technical Colleges~~; and

~~34.2.4.~~ employed by a law enforcement agency in Utah as a certified peace officer for one additional year after the completion of that academic year.

~~34.3. Utah Higher Education Assistance Authority ("UHEAA")~~ USHE will create and provide an application form ("PSOCAR Application") for use of qualifying students and the Institution where they are attending. The application will be available at the Utah Board of Higher Education website, ushe.edu. Applicants must complete the entire application and include all required documentation and certifications including,

~~34.3.1.~~ Employer certification from an authorized representative of each employer for the four year period and

~~34.3.2.~~ A copy of the tuition payment receipt(s) and transcript(s) with final grades for the enrollment period.

~~34.4.~~ In order to participate in the PSOCAR, a student must submit a completed PSOCAR Application to the Institution where ~~he or she is~~ they are attending by the application deadline set forth in R613-4. The application may be submitted by email, fax, post mail, or hand delivery.

~~34.5.~~ Eligible Institutions will establish a process for receiving and reviewing PSOCAR Applications. After receiving an application, the Institution will make a preliminary determination as to whether the student qualifies for tuition reimbursement under PSOCAR. The Institution will then forward the application with an explanation of its determination to USHE. ~~UHEAA~~. Institutions will forward all applications to USHE ~~UHEAA~~ no later than 15 days after the application deadline. USHE ~~UHEAA~~ will then make the final determination of each applicant's eligibility and make the awards as appropriate, subject to funding.

R613-~~54.~~ Application Deadlines

~~4.1. The 2017 application will allow for reimbursement to criminal justice students who were enrolled during the 2015-2016 academic year, defined as July 1, 2015 to June 30, 2016, who meet program requirements. Application deadlines for subsequent years will retain similar time frames, adjusted for the next year.~~

~~4.12.~~ For the first year of the program, qualified applicants may submit applications beginning July 1, 2017, after the post-enrollment work component is complete. Applicants ~~for subsequent years~~ may begin submitting applications on July 1 of the year in which they are applying.

~~4.3. 2017 applications are due by November 1, 2017 to be considered for reimbursement.~~

~~5.2 The deadline for subsequent years' applications will be~~ September 1st of the relevant year. Applications must be postmarked or received by the criminal justice department at the Institution by ~~the application deadline~~ September 1 in order to be considered. ~~The deadline for subsequent years' applications will be September 1st. The postmark or received by requirements remain the same.~~

R613-~~65~~. Appeals Process

~~56.1.~~ Applicants who wish to appeal a reimbursement decision may do so, in writing to the Commissioner of Higher Education or designee. ~~The applicant's appeal shall be postmarked within 30 days from the date on which the reimbursement decision was made by~~ USHE ~~UHEAA~~.

~~56.2.~~ Applicants shall include all relevant arguments and documentation in their written appeals.

~~56.3.~~ The Commissioner of Higher Education or designee shall review the appeal and issue a written decision in accordance with the Utah Administrative Procedures Act. The Commissioner's decision is the final agency action and is subject to judicial review under Part 4 of the Utah Administrative Procedures Act.

~~56.4.~~ Appeals proceedings under this subsection are designated as informal ~~pursuant to~~ under Utah Code section §63G-4-202.

R613, Public Safety Officer Career Advancement Reimbursement Program (PSOCAR)¹

R613-1 Purpose: PSOCAR is a state-funded tuition reimbursement program for certified peace officers enrolled in criminal justice related programs at a credit-granting institution in the Utah System of Higher Education (“Institution”).

R613-2 References

- 2.1** [Utah Code § 53B-1-102](#), Utah System of Higher Education
- 2.2** [Utah Code § 53B-8-112](#), Public Safety Officer Career Advancement Reimbursement Program (eff. August 31, 2020)
- 2.3** [Utah Code § 63G-4-202](#), Designation of Adjudicative Proceedings as Informal

R613-3 Program Sunsetting: Due to amendments made to Utah Code section 53B-8-112 in the 2022 legislative session, this policy and reimbursements made under it shall sunset on June 30, 2024. Beginning July 1, 2022, qualified peace officers, including those who were previously denied reimbursement based on lack of funding or who have received reimbursement under this policy, may seek grants for tuition under Board policy R614.

R613-4 Application Process

4.1 Qualified applicants may be reimbursed up to half the cost of tuition and fees with a maximum of \$5,000 per year, subject to funding. If the total applicant awards exceed available funding in any given year, the Board will reduce reimbursement amounts evenly across all qualified applicants, provided that the minimum amounts designated by statute for particular rural counties are first met. A student may participate in PSOCAR for a maximum of eight academic years.

4.2 To qualify, applicants must be:

- 4.2.1** a certified peace officer, currently employed by a law enforcement agency in Utah;
- 4.2.2** employed by a law enforcement agency in Utah as a certified peace officer for three consecutive years prior to the completion of the academic year for which they are seeking reimbursement;

¹ Approved May 19, 2017; amended January 19, 2018.

4.2.3 seeking a post-secondary degree in the area of criminal justice from a credit-granting institution in the Utah System of Higher Education (“USHE”); and

4.2.4 employed by a law enforcement agency in Utah as a certified peace officer for one additional year after the completion of that academic year.

4.3 USHE will create and provide an application form (“PSOCAR Application”) for use of qualifying students and the Institution where they are attending. The application will be available at the Utah Board of Higher Education website, ushe.edu. Applicants must complete the entire application and include all required documentation and certifications including,

4.3.1 Employer certification from an authorized representative of each employer for the four year period and

4.3.2 A copy of the tuition payment receipt(s) and transcript(s) with final grades for the enrollment period.

4.4 In order to participate in the PSOCAR, a student must submit a completed PSOCAR Application to the Institution where they are attending by the application deadline set forth in R613-4. The application may be submitted by email, fax, post mail, or hand delivery.

4.5 Eligible Institutions will establish a process for receiving and reviewing PSOCAR Applications. After receiving an application, the Institution will make a preliminary determination as to whether the student qualifies for tuition reimbursement under PSOCAR. The Institution will then forward the application with an explanation of its determination to USHE. Institutions will forward all applications to USHE no later than 15 days after the application deadline. USHE will then make the final determination of each applicant’s eligibility and make the awards as appropriate, subject to funding.

R613-5 Application Deadlines

5.1 Applicants may begin submitting applications on July 1 of the year in which they are applying.

5.2 The deadline for applications is September 1 of the relevant year. Applications must be postmarked or received by the criminal justice department at the Institution by September 1 in order to be considered.

R613-6 Appeals Process

6.1 Applicants who wish to appeal a reimbursement decision may do so, in writing to the Commissioner of Higher Education or designee. The applicant’s appeal shall be postmarked within 30 days from the date on which the reimbursement decision was made by USHE.

6.2 Applicants shall include all relevant arguments and documentation in their written appeals.

6.3 The Commissioner of Higher Education or designee shall review the appeal and issue a written decision in accordance with the Utah Administrative Procedures Act. The Commissioner's decision is the final agency action and is subject to judicial review under Part 4 of the Utah Administrative Procedures Act.

6.4 Appeals proceedings under this subsection are designated as informal under Utah Code section 63G-4-202.

R614, Public Safety Officer Career Advancement Grant Program¹

R614-1 Purpose: The Public Safety Officer Career Advancement Grant Program (“PSOCAG”) is a state-funded tuition grant program for certified peace officers currently employed by a Utah law enforcement agency and seeking a post-secondary degree in criminal justice related program at a credit-granting institution in the Utah System of Higher Education (“USHE”).

R614-2 References

- 2.1** [Utah Code § 53B-1-102](#), Utah System of Higher Education
- 2.2** [Utah Code § 53B-8-112](#), Public Safety Officer Career Advancement Grant Program
- 2.3** [Utah Code § 63G-4-202](#), Designation of Adjudicative Proceedings as Informal

R614-3 Definitions

- 3.1 “Post-Secondary Degree”** means an associate, bachelor’s, master’s, or doctoral degree.

R614-4 Qualifications:

- 4.1** To qualify for PSOCAG, an applicant must be:
 - 4.1.1** A certified peace officer;
 - 4.1.2** Currently employed by a Utah law enforcement agency; and
 - 4.1.3** Seeking a post-secondary degree in a criminal justice related program from a USHE institution.
- 4.2** Institutions shall annually revise and publish eligibility criteria in all publications referencing the grant.

R614-5 Application Process

¹ Approved XXX

5.1 Each institution will establish processes for receiving and reviewing applications and distributing awards consistent with this policy and will set application deadlines that accommodate both full-time and part-time students.

5.1.1 The application must include information about other means an applicant may finance their education.

5.1.2. The application must include a notice to students that the amount of the award is subject to available funding and may be reduced.

5.2. Applicants must complete and submit either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board and the application and include all required documentation requested by the institution.

R614-6 Grant Amounts: Subject to funding and section 8 below, qualified applicants may be given a grant up to the cost of tuition and fees with a maximum of \$5,000 each academic year. A student may participate in PSOCAG for a maximum of four academic years.

R614-9 Appeals

9.1 An applicant has the right to appeal an adverse decision. Upon request by the student, the institution shall provide an opportunity for the student to appeal an adverse decision to a committee of at least three impartial persons.

R614-10 Reporting

10.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other grant information for the most recently completed fiscal year.

10.2. The Office of the Commissioner may, at any time, request additional documentation or data related to the PSOCAG Program and may review or formally audit an institution's documentation and compliance with this policy.

R615, Talent Development Incentive Loan Program

R615-1 Purpose: To establish the criteria and process for awarding incentive loans from the Talent Development Incentive Loan Program under Utah Code ~~S~~section 53B-10-201.

R615-2 References

2.1 [Utah Code Title 53B Chapter 10 Part 2, Talent Development Loan Program](#)

2.2 [Board Policy R619, Talent Development Incentive Award Program](#)

R615-3 Definitions

3.1 “Full-time student” means a student who is enrolled in a minimum of 12 credit hours.

3.2 “GOED” means the Governor’s Office of Economic Development created in ~~50~~[Utah Code](#) ~~S~~section 63N-1-201.

3.3 “Incentive loan” means an incentive loan awarded by an institution to a full-time student who has met the eligibility criteria as established by the Board of Higher Education.

3.4 “Qualifying degree” means an associate or a bachelor’s degree that qualifies an individual to work in a qualifying job.

3.5 “Qualifying job” means a job described in ~~S~~[subsection](#) 6.2 for which an individual may receive an incentive loan.

R615-4 Program Sunsetting: [Due to amendments made to Utah Code Title 53B Title Chapter 8 Part 2 in the 2022 legislative session, this program shall sunset on May 3, 2022. Nevertheless, this policy shall remain in effect until there are no more outstanding loans made under it. Beginning May 4, 2022, qualified applicants may seek talent development awards under Board policy R619.](#)

R615-~~45~~ Appropriations: The program is funded by appropriations from the Legislature made in accordance with [Utah Code](#) ~~S~~section 53B-10-201.

R615-~~65~~ Application Procedures: A full-time student pursuing a qualifying degree may apply for an incentive loan from the institution at which ~~he or she is~~[they are](#) attending by doing the following:

65.1 The institutions shall develop an application that, at minimum, collects the following information:

56.1.1 The applicant's status as a full-time or part-time student.

56.1.2 The applicant's current enrollment or registered enrollment for and the upcoming semester if available.

56.1.3 A transcript demonstrating the applicant's completed course work.

56.1.4 A section for the applicant to formally declare their intent to pursue a qualifying degree and to work in a qualifying job, with a signature.

56.2 Institutions shall set application deadlines by which applicants must submit all required materials.

56.3 Institutions shall determine the most efficient method for issuing incentive loan funds and collect the necessary information for that purpose.

R615-76 Qualifying Criteria

76.1 Applicants must meet the following criteria to qualify for an incentive loan:

76.1.1 The applicant must have completed at least two semesters of full-time equivalent course work if ~~he or she~~they are pursuing a bachelor's degree, or at least one semester of full-time equivalent course work if ~~he or she is~~they are pursuing an associate degree.

76.1.2 The applicant is enrolled full-time.

76.1.3 The applicant signs a declaration stating ~~he or she is~~they are pursuing or will pursue a qualifying degree.

76.1.4 The applicant signs a declaration stating their intent to work in a qualifying job in Utah following graduation.

76.1.5 The applicant must provide the institution verification of registration for classes within the qualifying degree program before the institution may release the funds.

76.2 Every other academic year, the Governor's Office of Economic Development (GOED) shall select five jobs that have the highest demand for new employees and offer high wages. Beginning the August of that year, those five positions are designated as qualifying jobs for the purposes of this incentive loan program. When selecting the qualifying jobs, GOED shall ensure the jobs meet the following criteria:

76.2.1 Rank in the top 40 percent of jobs based on an employment index that considers job growth rates and total openings.

76.2.2 Rank in the top 40 percent for wages.

76.2.3 Requires an associate degree or a bachelor's degree.

76.3 In conjunction with selecting the qualifying jobs, GOED will identify and designate the bachelor's or associate degrees required to qualify for the five qualifying jobs.

R615-87 Loan Amounts.

87.1 Institutions may loan an amount up to the cost of resident tuition, books, and fees for their respective institutions.

87.2 Institutions may loan amounts up to the expected time for the recipient to complete the qualifying degree, as determined by the institution.

R615-98 Funding Distribution.

98.1 The Board will disburse appropriated funds to the institutions by calculating the three-year average of the qualifying degrees each institution awarded using the following assumptions:

98.1.1 Tuition and fees (not including books, differential, course, or program fees)

98.1.2 Full tuition and fee cost of associate degree students by institution for three semesters (requires 1 semester before applying)

98.1.3 Full tuition and fee cost of bachelor's degree students by institution for six semesters (requires 2 semesters before applying)

98.1.4 After year one, tuition and fees adjusted for inflation (five-year average of 3.5 percent)

R615-109 Loan Cancellation, Repayment, and Waiver.

109.1 For each year that a recipient works in a qualifying job in Utah following completion of a qualifying degree, the institution that awarded the incentive loan shall waive repayment of the amount of one year of the recipient's incentive loan.

109.2 An institution shall require a recipient to repay to the institution the full amount of an incentive loan if the recipient fails to:

109.2.1 Graduate with a qualifying degree within six years of initially receiving the incentive loan,

109.2.2 Work in a qualifying job in Utah within one year of completing a qualifying degree, or

109.2.3 Works in a qualifying job for fewer years than the number of years required to waive repayment of the full incentive loan.

109.3 Institutions may cancel an incentive loan if the recipient changes the degree ~~he or she~~they selected in the declaration at any time prior to graduation.

109.4 Institutions may waive repayment if a recipient has graduated with a qualifying degree within six years of receiving the loan, works in a non-qualifying job that the institution determines is reasonably related to the degree, and resides in Utah.

109.5 Institutions may delay repayment for reasonable, unforeseen circumstances that inhibits the recipient's ability to meet the requirements for loan payment waivers as described above.

109.6 Institutions may waive repayment for circumstances of prolonged financial hardship.

R615-~~11~~10** General Administration.**

11~~0~~.1 Institutions may establish policies for administering this program that align with their existing practices and financial aid programs.

R615, Talent Development Incentive Loan Program¹

R615-1 Purpose: To establish the criteria and process for awarding incentive loans from the Talent Development Incentive Loan Program under Utah Code section 53B-10-201.

R615-2 References

2.1 [Utah Code Title 53B Chapter 10 Part 2](#), Talent Development Loan Program

2.2 Board Policy R619, Talent Development Incentive Award Program

R615-3 Definitions

3.1 “Full-time student” means a student who is enrolled in a minimum of 12 credit hours.

3.2 “GOED” means the Governor’s Office of Economic Development created in Utah Code section 63N-1-201.

3.3 “Incentive loan” means an incentive loan awarded by an institution to a full-time student who has met the eligibility criteria as established by the Board of Higher Education.

3.4 “Qualifying degree” means an associate or a bachelor’s degree that qualifies an individual to work in a qualifying job.

3.5 “Qualifying job” means a job described in subsection 6.2 for which an individual may receive an incentive loan.

R615-4 Program Sunsetting: Due to amendments made to Utah Code Title 53B Title Chapter 8 Part 2 in the 2022 legislative session, this program shall sunset on May 3, 2022. Nevertheless, this policy shall remain in effect until there are no more outstanding loans made under it. Beginning May 4, 2022, qualified applicants may seek talent development awards under Board policy R619.

R615-5 Appropriations: The program is funded by appropriations from the Legislature made in accordance with Utah Code section 53B-10-201.

¹ Adopted November 16, 2018.

R615-6 Application Procedures: A full-time student pursuing a qualifying degree may apply for an incentive loan from the institution at which they are attending by doing the following:

6.1 The institutions shall develop an application that, at minimum, collects the following information:

6.1.1 The applicant's status as a full-time or part-time student.

6.1.2 The applicant's current enrollment or registered enrollment for and the upcoming semester if available.

6.1.3 A transcript demonstrating the applicant's completed course work.

6.1.4 A section for the applicant to formally declare their intent to pursue a qualifying degree and to work in a qualifying job, with a signature.

6.2 Institutions shall set application deadlines by which applicants must submit all required materials.

6.3 Institutions shall determine the most efficient method for issuing incentive loan funds and collect the necessary information for that purpose.

R615-7 Qualifying Criteria

7.1 Applicants must meet the following criteria to qualify for an incentive loan:

7.1.1 The applicant must have completed at least two semesters of full-time equivalent course work if they are pursuing a bachelor's degree, or at least one semester of full-time equivalent course work if they are pursuing an associate degree.

7.1.2 The applicant is enrolled full-time.

7.1.3 The applicant signs a declaration stating they are pursuing or will pursue a qualifying degree.

7.1.4 The applicant signs a declaration stating their intent to work in a qualifying job in Utah following graduation.

7.1.5 The applicant must provide the institution verification of registration for classes within the qualifying degree program before the institution may release the funds.

7.2 Every other academic year, the Governor's Office of Economic Development (GOED) shall select five jobs that have the highest demand for new employees and offer high wages. Beginning the August of that year, those five positions are designated as qualifying jobs for the purposes of this incentive loan program. When selecting the qualifying jobs, GOED shall ensure the jobs meet the following criteria:

7.2.1 Rank in the top 40 percent of jobs based on an employment index that considers job growth rates and total openings.

7.2.2 Rank in the top 40 percent for wages.

7.2.3 Requires an associate degree or a bachelor's degree.

7.3 In conjunction with selecting the qualifying jobs, GOED will identify and designate the bachelor's or associate degrees required to qualify for the five qualifying jobs.

R615-8 Loan Amounts.

8.1 Institutions may loan an amount up to the cost of resident tuition, books, and fees for their respective institutions.

8.2 Institutions may loan amounts up to the expected time for the recipient to complete the qualifying degree, as determined by the institution.

R615-9 Funding Distribution.

9.1 The Board will disburse appropriated funds to the institutions by calculating the three-year average of the qualifying degrees each institution awarded using the following assumptions:

9.1.1 Tuition and fees (not including books, differential, course, or program fees)

9.1.2 Full tuition and fee cost of associate degree students by institution for three semesters (requires 1 semester before applying)

9.1.3 Full tuition and fee cost of bachelor's degree students by institution for six semesters (requires 2 semesters before applying)

9.1.4 After year one, tuition and fees adjusted for inflation (five-year average of 3.5 percent)

R615-10 Loan Cancellation, Repayment, and Waiver.

10.1 For each year that a recipient works in a qualifying job in Utah following completion of a qualifying degree, the institution that awarded the incentive loan shall waive repayment of the amount of one year of the recipient's incentive loan.

10.2 An institution shall require a recipient to repay to the institution the full amount of an incentive loan if the recipient fails to:

10.2.1 Graduate with a qualifying degree within six years of initially receiving the incentive loan,

10.2.2 Work in a qualifying job in Utah within one year of completing a qualifying degree, or

10.2.3 Works in a qualifying job for fewer years than the number of years required to waive repayment of the full incentive loan.

10.3 Institutions may cancel an incentive loan if the recipient changes the degree they selected in the declaration at any time prior to graduation.

10.4 Institutions may waive repayment if a recipient has graduated with a qualifying degree within six years of receiving the loan, works in a non-qualifying job that the institution determines is reasonably related to the degree, and resides in Utah.

10.5 Institutions may delay repayment for reasonable, unforeseen circumstances that inhibits the recipient's ability to meet the requirements for loan payment waivers as described above.

10.6 Institutions may waive repayment for circumstances of prolonged financial hardship.

R615-11 General Administration.

11.1 Institutions may establish policies for administering this program that align with their existing practices and financial aid programs.

R619, Talent Development Award Program¹

R619-1 Purpose: The Talent Development Award Program is intended to recruit and train individuals to work in certain jobs that have a high demand for new employees and offer high wages in Utah, ensuring students with the highest financial need are supported. To establish the criteria and process for awarding Talent Development Award Program grant.

R619-2 References

- 2.1** [Utah Code Title 53B Chapter 10 Part 2](#), Talent Development Award Program

R619-3 Definitions

- 3.1 “Grant”** means a monetary grant issued under this policy.
- 3.2 “Full-time student”** means a student who is enrolled in a minimum of 12 credit hours.
- 3.3 “GO Utah Office”** means the Governor’s Office of Economic Development created in Utah Code section 63N-1-201.
- 3.4 “Qualifying degree”** means an associate or a bachelor’s degree that qualifies an individual to work in a qualifying job.
- 3.5 “Qualifying job”** means a job described in subsection 7.1 for which an individual may receive a grant.

R619-4 Appropriations: The program is funded by appropriations from the Legislature made in accordance with Utah Code section 53B-10-201.

R619-5 Qualifications:

- 5.1** To qualify for a grant, an applicant must:
- 5.1.1** Be enrolled as a student at a USHE institution;
 - 5.1.2** Sign a declaration that they are pursuing, or will pursue, a qualifying degree;
 - 5.1.3** Sign a declaration of their intent to work in a qualifying job in Utah following graduation;

¹ Adopted XXX

5.1.4 Apply to the institution to receive a grant; and

5.1.5 Complete and submit an application and either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board.

5.2 Institutions shall annually revise and publish eligibility criteria in all publications referencing the grant.

R619-6 Application Process:

6.1 Applicants may apply for a grant on an application provided by their institution. The application provided by the institution shall collect, at a minimum:

6.1.1 The applicant's status as a full-time or part-time student;

6.1.2 The applicant's current enrollment or registered enrollment for the upcoming semester, if available;

6.1.3 The applicant's formal declaration of their intent to pursue a qualifying degree and to work in a qualifying job, including the applicant's signature.

6.2 The institution shall set deadlines by which applicants must submit all required materials.

6.3 The institution shall determine the most efficient method for issuing grant funds and shall collect the information necessary for that purpose.

R619-7 Qualifying Jobs and Degrees

7.1 Every other academic year, the GO Utah Office shall select five jobs that have the highest demand for new employees and offer high wages. Beginning in August of that year, those five positions are designated as qualifying jobs for the purposes of this grant program. Qualifying jobs must, at a minimum:

7.1.1 Rank in the top 40 percent of jobs based on an employment index that considers both job growth rates and total openings;

7.1.2 Rank in the top 40 percent for wages; and

7.1.3 Require an associate degree or a bachelor's degree.

7.2 At the same time, the GO Utah Office will identify and designate the associate or bachelor's degrees required to qualify for the five qualifying jobs.

R619-8 Award Prioritization

8.1 Grant awards and funding amounts shall prioritize students who demonstrate financial need.

8.2 The institution may reduce the grant amount based on the student's ability to finance the cost of their attendance through loans, other grants, employment, and family and individual contributions.

8.3 An institution shall establish criteria to assess an applicant's financial need. The criteria shall use quantifiable, need-based measures (for example, institutions may establish a range with a minimum and maximum need index based on the Free Application for Federal Student Aid within which an eligible recipient's expected contribution must fall to be eligible for an award).

R619-9 Grant Amounts: Subject to funding and section 8 above, an institution may grant an amount up to the cost of resident tuition, books, and fees for their institution up to the expected time for the recipient to complete the qualifying degree, as determined by the institution.

R619-10 Distribution of Funds to Institutions

10.1 The Board will annually distribute available funds to eligible institutions proportionally equal to the total number of students who graduated from an eligible program the previous two years.

R619-11 Release of Funds: The applicant must provide the institution verification of registration for classes within the qualifying degree program before the institution may release the funds.

R619-12 Grant Transfers: A recipient may transfer to another institution and retain eligibility for the grant, if the recipient meets the qualifications defined in section 5 at the institution to which the recipient is transferring. Recipients are responsible to inform the financial aid office at the institution to which they are transferring that they are receiving the Talent Development Grant at their current institution. The financial aid offices at the respective institutions shall coordinate the transfer of scholarship information. Upon transfer, the institution shall prioritize the award of any eligible recipient before all others awarded in accordance with section 9 of this policy.

R619-13 Grant Deferrals

13.1 A recipient shall apply for a deferral if they do not continuously enroll and wish to continue to receive the grant.

13.2 Institutions shall develop a process for recipients to apply for deferrals.

R619-14 Grant Cancellation

14.1 An institution may cancel a grant if the recipient changes the degree they selected in the application at any time prior to graduation.

14.2 If a recipient does not return to pursue their degree after a deferral, their grant will be canceled, and no remaining funds will be released.

R619-15 Reporting

8.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other Talent Development Award information for the most recently completed fiscal year.

8.2. The Office of the Commissioner may, at any time, request additional documentation or data related to the Talent Development Award Program and may review or formally audit an institution's documentation and compliance with this policy.

R619-16 General Administration: Institutions may establish policies for administering this program that align with their existing practices and financial aid programs.

R620, ~~Aaccess~~Utah Promise Program ScholarshipGrant

R620-1 Purpose: The Utah Promise Grant is a statewide need-based grant program that expands access to postsecondary opportunities to all. This policy~~To provide outlines~~ the Utah Board of Higher Education's ~~Policy~~ ("The Board") policy and procedures for administering implementing the Aaccess~~the~~ Utah Promise Scholarship Grant; ("Promise Scholarship"). This program provides a statewide needs-based scholarship grant ~~program thato expands access to postsecondary opportunities for to all students who face financial barriers in paying for college. The program provides students who qualify an award for of up to full tuition and fees in qualifying circumstances.~~

R620-2 References

- 2.1 Utah Code Title 53B Chapter 13a Part 1, Utah Promise Program Act
- 2.2 Utah Code § 63G-12-402, Receipt of State, Local, or Federal Public Benefits – Verification Exceptions
- 2.3 Utah Code § 53B-2-101(1), Institutions of Higher Education
- 2.4 Utah Code § 53B-8-102, Resident Student Status
- 2.5 Utah Code § 53B-8-106, Resident Tuition
- 2.6 Board Policy R512, Determination of Resident Status

R620-3 Definitions

3.1 “Cost of Attendance” means the estimated costs associated with attending an institution, including costs payable to the institution for tuition and fees, other direct educational expenses, transportation, and living expenses while attending the institution.

3.2~~1~~ “Institution” means an institutions of higher education ~~listed in Utah Code Section 53B-2-101(1)~~under Utah Code section 53B-2-101(1).

3.3 “OCHE” means the Office of the Commissioner of Higher Education.

3.4 “Promise Grant” means a grant awarded under the Utah Promise Program Act and administered under this policy.

3.2~~2~~ “Promise Partner” ~~an employer that has applied to the Board, and has established a Memorandum of Understanding (MOU) with the Board.~~

R620-4 ~~Scholarship Administration~~ Qualifications: -

~~4.1 Eligibility:~~ 4.1 To qualify for a Promise ~~Scholarship~~ Grant, an applicants must ~~meet~~ the following criteria:

~~4.1.1~~ Have a high school diploma or equivalent;

4.1.1 Be enrolled as at an institution;

~~4.1.2~~ Not have previously earned an associate degree or higher postsecondary degree;

~~4.1.1-23~~ Be Either be a resident of ~~the State of~~ Utah under Utah Code section 53B-8-102 and Board Policy R512 or qualify for resident tuition under Utah Code section 53B-8-106;

~~4.1.1-34~~ Demonstrate financial need, in accordance with subsections ~~4.2~~ and ~~4.76~~;

~~4.1.1-45~~ Accept all other grants, tuition and/or fee waivers, and scholarships offered to the applicant to attend the institution in which the applicant enrolls; and

~~4.1.1-56~~ Maintain academic good standing as defined by the institution ~~at which~~ the applicants attends.

4.2 Institutions shall annually revise and publish eligibility criteria in all publications referencing the grant. All publications about the Promise Grant shall disclose that program funds are limited and subject to change.

4.3 Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for a grant under this policy.

R620-5 Application Process:

5.1 Institutions shall establish an application process consistent with this policy that applicants can easily access and complete. The Board may require an institution to modify an application or process that is overly cumbersome or confusing.

5.2 The institution shall set deadlines by which applicants must submit all required materials.

5.3 The institution shall determine the most efficient method for issuing grant funds and shall collect the information necessary for that purpose.

5.4 Applicants must complete and submit either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board and the grant application and include all required documentation.

R620-6 Prioritization: Grants shall be prioritized based primarily on financial need. An institution shall establish criteria to assess an applicant's financial need. The criteria shall use quantifiable, need-based measures (for example, institutions may establish a range with a minimum and maximum need index based on the Free Application for Federal Student Aid within which an eligible recipient's expected contribution must fall to be eligible for an award).

R620-7 Grant Award and Calculation

7.1 An institution shall use other funding sources, tuition waivers, and fee waivers, when possible, to fully fund awards.

7.2 In determining awards, the institution shall consider all other loans, grants, employment, and family and individual contributions the applicant can put toward financing the cost of attendance.

7.3 Grants shall be prioritized based primarily on financial need as outlined in section 6.

~~4.3 Scholarship~~ 7.4 Award: ~~The institution may award an amount to each~~an eligible recipient up to the cost of ~~published tuition and fees~~attendance, after taking into account the total value of other financial aid the recipient receives toward the cost of attendance.

~~4.4 Last Dollar In:~~ When determining the award amount, the institution shall first apply the total value of all grants and scholarships the recipient has received. The institution may then award an amount not to exceed the recipient's remaining cost of tuition and fees. If, after the recipient's aid has been packaged and awarded, the student later receives other financial assistance of more than \$500, the institution will appropriately reduce the amount of financial aid disbursed to the student so that the total Promise Scholarship does not exceed the cost of tuition and fees.

R620-8 Grant Duration: ~~After an institution has awarded a Promise Grant to an eligible recipient, as long as the recipient continues to meet the qualifications, the Promise Grant shall continue until the earlier of either:~~

~~4.5.8.1~~ Two years after the initial ~~award~~grant; or

~~4.5.8.2~~ A recipient uses the ~~scholarship~~grant to attend an institution for four semesters.;

~~**4.8 Competency-based Assessment:** Institutions shall evaluate a recipient's knowledge, skills, and competencies acquired through formal or informal education outside the traditional postsecondary academic environment, and award appropriate credit for the recipient's prior learning.~~

~~**4.9 Outreach:** Institutions may advertise the Promise Scholarship under another name. All publications about the Promise Scholarship shall include disclosure that program funds are limited and subject to change.~~

R620-9 Competency-based Assessment: Institutions shall evaluate a recipient's knowledge, skills, and competencies acquired through formal or informal education outside the traditional postsecondary academic environment, and award appropriate credit for the recipient's prior learning.

R620-10.5 Grant Transfers: A recipient may transfer to another institution and retain eligibility for the grant, if the recipient meets the qualifications defined in section 4 at the institution to which the recipient is transferring. Recipients are responsible to inform the financial aid office at the institution to which they are transferring that they are receiving the Promise Grant at their current institution. The financial aid offices at the respective institutions shall coordinate the transfer of scholarship information. Upon transfer, the institution shall prioritize the award of any eligible recipient before all others awarded in accordance with section 6 of this policy. The institution to which the recipient is transferring shall make adjustments in a recipient's award in accordance with subsections 7 of this policy

~~**5.1** A recipient may transfer to another institution and retain eligibility for the scholarship, if the recipient meets the qualifications defined in sections 4.2 at the institution to which the recipient is transferring. Recipients are responsible to inform the financial aid office at the institution to which they are transferring that they are receiving the Promise Scholarship at their current institution. The financial aid offices at the respective institutions shall coordinate the transfer of scholarship information. Upon transfer, the institution shall prioritize the award of any eligible recipient before all others awarded in accordance with section 4.7 of this policy. The institution to which the recipient is transferring shall make adjustments in a recipient's award in accordance with section 4.3 of this policy.~~

R620-11.6 Distribution of Award Funds to Institutions:

~~**6.1** As a condition of program participation, an eligible institution's financial aid director will report to the Board the total dollar amount of Federal Pell Grant funds awarded to resident students at the institution for the most recently completed academic year by March 1 each year.~~

~~**6.1.1** An institution that fails to report the total amount of Pell Grant funds by March 1 is ineligible to participate in the program for the next fiscal year.~~

~~611.12~~ In determining how to allocate program funds to an institution, the Board will consider:

~~11.1.1~~ The costs of attendance of programs offered by the institution; and

~~11.1.2~~ The number of eligible students who attend each institution.

~~11.2~~ The Board will allocate program funds to eligible institutions in proportion to each eligible institution's percentage ~~the~~ of the total Federal Pell Grant funds received for Utah resident students and students who qualified for resident tuition in the most recently completed award year by all participating institutions.

R620-~~12~~7 Grant Deferrals ~~or Leave of Absence~~:

~~123.1.~~ Institutions shall develop a process for recipients to apply for deferrals or leaves of absence, which may be granted for military service, humanitarian/religious service, documented medical reasons, and other exigent reasons.

~~13.1~~ A recipient shall apply for a deferral or leave of absence if they do not continuously enroll and wish to continue to receive the scholarship grant. A one-time deferral may be granted for one semester by the institution. Any deferral requested for more than one semester shall require OCHE approval.

~~13.2~~ Institution representatives shall report all deferrals granted to OCHE each semester.

~~13.37.1~~ Institutions shall develop a process for recipients to apply for deferrals.

~~13.4~~ Deferrals are not automatically granted and are approved only for exceptional circumstances such as, but not limited to, prolonged illness, military service, humanitarian or religious service or leaves of absence, which may be granted for military service, humanitarian/religious service, documented medical reasons, and other exigent reasons.

R620-13 Grant Cancellation: If a recipient does not return to pursue their degree after a deferral, or no longer meets the eligibility requirements, their grant will be canceled, and no remaining funds will be released.

R620-8 Utah Promise Partners

~~8.1~~ The Board, in consultation with the Talent Ready Utah Center at the Governor's Office of Economic Development, may select employers as Promise Partners whose employees may be eligible to receive a partner award. The Board shall establish an MOU with any selected Promise Partner that includes requirements related to an employer providing reimbursement to an employee who receives an award. The reimbursement of a Promise Partner to a

corresponding recipient employed by that Promise Partner must be applied during the eligible term of the award in accordance with section 4.4. of this policy.

~~8.2 An employee is eligible to receive an award in accordance with the requirements of section 4.1 of this policy in addition to any criteria and limitations established through a corresponding MOU with a Promise Partner.~~

~~8.3 A recipient of an award who is an employee of a Promise Partner is subject to the same conditions as all other recipients under this policy.~~

R620-14 Reporting

14.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other Promise Grant award information for the most recently completed fiscal year.

14.2. The Office of the Commissioner may, at any time, request additional documentation or data related to the Utah Promise Program Grant and may review or formally audit an institution's documentation and compliance with this policy.

~~16.19.2 Annually, the Board will distribute a Promise Scholarship Grant performance report template to the director of financial aid of each participating institution before the end of each fiscal year. The institution will submit the completed report by July 31 of each year.~~

~~9.316.2 The Board may, at any time, request additional documentation or data related to the Promise Grant Scholarship and may review or formally audit an institution's compliance with this policy. The institution will cooperate with the Board in providing records and information requested for any scheduled audits or program reviews. Participating institutions shall maintain records substantiating their compliance with all the program's terms for three years after the end of the award year, or until a program review has been completed and any exceptions raised in the review have been resolved, whichever occurs first. If at the end of the three-year retention period, an audit or program review exception is pending resolution, the institution will retain records for the award year involved until the exception has been resolved.~~

14.3 By March 1 of each year, participating institutions financial aid directors will report to the Board the total dollar amount of Federal Pell Grant funds awarded to resident students and students who qualified for resident tuition under Utah Code section 53B-8-106 at the institution for the most recently completed academic year.

14.4 An institution that fails to submit the required reports by the required deadlines may be ineligible to participate in the program for the next fiscal year.

R620-15 Administrative Costs: The Board may use up to 3% of the money appropriated for the Utah Promise Program to cover administrative costs.

~~R620-9~~ Reporting

~~9.1~~ During the first year of the program, no later than October 1, 2019, participating institutions shall report to the Board all requested data on Promise Scholarships awarded to date.

~~9.2~~ Annually, the Board will distribute a Promise Scholarship performance report template to the director of financial aid of each participating institution before the end of each fiscal year. The institution will submit the completed report by July 31 of each year.

~~9.3~~ The Board may, at any time, request additional documentation or data related to the Promise Scholarship and may review or formally audit an institution's compliance with this policy. The institution will cooperate with the Board in providing records and information requested for any scheduled audits or program reviews. Participating institutions shall maintain records substantiating its compliance with all the program's terms for three years after the end of the award year, or until a program review has been completed and any exceptions raised in the review have been resolved, whichever occurs first. If at the end of the three-year retention period, an audit or program review exception is pending resolution, the institution will retain records for the award year involved until the exception has been resolved.

~~R620-16~~ Institutional Participation Agreement: Each participating institution will enter into a written agreement with the Board or assigned designee agreeing to abide by the program policies, accept and disburse funds per program rules, provide the required report each year, and retain documentation for the program to support the awards and actions taken. By accepting the funds, the participating institution agrees to the additional following terms and conditions:

~~16.1~~ The institution may at its discretion use up to ~~three percent~~ 3% of the funds it receives for the allocated program Utah Promise Program funds for its to cover administrative costs ~~student financial aid administrative expenses~~.

~~16.2~~ The institution may not carry forward or carry back from one award year to another any of its Promise ~~Scholarship~~ Grant allocation. Any exception to this rule must be approved in advance by the Board. The institution will inform the Board immediately if it determines it will not be able to utilize all program funds allotted to it for an award year. Absent any exception for a carry forward amount, institutions shall return unused funds to the Board. The Board will redistribute unused to the other eligible institutions as supplemental Promise ~~Scholarship~~ Grant allocations for disbursement during the same award year. The portion of Promise ~~Scholarship~~ Grant allocations budgeted for administrative expenses pursuant to subSection ~~18~~ 16.1 will not be part of any carryover.

R620-17 Report to Higher Education Appropriations Subcommittee:
Annually, the Board shall submit an electronic report to the Higher Education Appropriations Subcommittee about the Utah Promise Program.

Adopted May 17, 2019; Amended May 15, 2020, and XXX.

R620, Utah Promise Program Grant¹

R620-1 Purpose: The Utah Promise Grant is a statewide need-based grant program that expands access to postsecondary opportunities to all. This policy outlines the Utah Board of Higher Education's ("Board") policy and procedures for administering the Utah Promise Grant.

R620-2 References

- 2.1 [Utah Code Title 53B Chapter 13a Part 1](#), Utah Promise Program Act
- 2.2 [Utah Code § 63G-12-402](#), Receipt of State, Local, or Federal Public Benefits – Verification Exceptions
- 2.3 [Utah Code § 53B-2-101\(1\)](#), Institutions of Higher Education
- 2.4 [Utah Code § 53B-8-102](#), Resident Student Status
- 2.5 [Utah Code § 53B-8-106](#), Resident Tuition
- 2.6 [Board Policy R512](#), Determination of Resident Status

R620-3 Definitions

- 3.1 **“Cost of Attendance”** means the estimated costs associated with attending an institution, including costs payable to the institution for tuition and fees, other direct educational expenses, transportation, and living expenses while attending the institution.
- 3.2 **“Institution”** means an institution of higher education under Utah Code section 53B-2-101(1).
- 3.3 **“OCHE”** means the Office of the Commissioner of Higher Education.
- 3.4 **“Promise Grant”** means a grant awarded under the Utah Promise Program Act and administered under this policy.

R620-4 Qualifications:

- 4.1 To qualify for a Promise Grant, an applicant must:

¹ Adopted May 17, 2019; Amended May 15, 2020, and XXX

4.1.1 Be enrolled as at an institution;

4.1.2 Either be a resident of Utah under Utah Code section 53B-8-102 and Board Policy R512 or qualify for resident tuition under Utah Code section 53B-8-106;

4.1.3 Demonstrate financial need, in accordance with subsections 6;

4.1.4 Accept all other grants, tuition and/or fee waivers, and scholarships offered to the applicant to attend the institution in which the applicant enrolls; and

4.1.5 Maintain academic good standing as defined by the institution the applicant attends.

4.2 Institutions shall annually revise and publish eligibility criteria in all publications referencing the grant. All publications about the Promise Grant shall disclose that program funds are limited and subject to change.

4.3 Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for a grant under this policy.

R620-5 Application Process:

5.1 Institutions shall establish an application process consistent with this policy that applicants can easily access and complete. The Board may require an institution to modify an application or process that is overly cumbersome or confusing.

5.2 The institution shall set deadlines by which applicants must submit all required materials.

5.3 The institution shall determine the most efficient method for issuing grant funds and shall collect the information necessary for that purpose.

5.4 Applicants must complete and submit either the Free Application for Federal Student Aid (FAFSA) or the alternative financial form approved by the Board and the grant application and include all required documentation.

R620-6 Prioritization: Grants shall be prioritized based primarily on financial need. An institution shall establish criteria to assess an applicant's financial need. The criteria shall use quantifiable, need-based measures (for example, institutions may establish a range with a minimum and maximum need index based on the Free Application for Federal Student Aid within which an eligible recipient's expected contribution must fall to be eligible for an award).

R620-7 Grant Award and Calculation

7.1 An institution shall use other funding sources, tuition waivers, and fee waivers, when possible, to fully fund awards.

7.2 In determining awards, the institution shall consider all other loans, grants, employment, and family and individual contributions the applicant can put toward financing the cost of attendance.

7.3 Grants shall be prioritized based primarily on financial need as outlined in section 6.

7.4 The institution may award an amount to an eligible recipient up to the cost of attendance, after taking into account the total value of other financial aid the recipient receives toward the cost of attendance.

R620-8 Grant Duration: After an institution has awarded a Promise Grant to an eligible recipient, as long as the recipient continues to meet the qualifications, the Promise Grant shall continue until the earlier of either:

8.1 Two years after the initial grant; or

8.2 A recipient uses the grant to attend an institution for four semesters.

R620-9 Competency-based Assessment: Institutions shall evaluate a recipient's knowledge, skills, and competencies acquired through formal or informal education outside the traditional postsecondary academic environment, and award appropriate credit for the recipient's prior learning.

R620-10 Grant Transfers: A recipient may transfer to another institution and retain eligibility for the grant, if the recipient meets the qualifications defined in section 4 at the institution to which the recipient is transferring. Recipients are responsible to inform the financial aid office at the institution to which they are transferring that they are receiving the Promise Grant at their current institution. The financial aid offices at the respective institutions shall coordinate the transfer of scholarship information. Upon transfer, the institution shall prioritize the award of any eligible recipient before all others awarded in accordance with section 6 of this policy. The institution to which the recipient is transferring shall make adjustments in a recipient's award in accordance with subsections 7 of this policy

R620-11 Distribution of Funds to Institutions:

11.1 In determining how to allocate program funds to an institution, the Board will consider:

11.1.1 The costs of attendance of programs offered by the institution; and

11.1.2 The number of eligible students who attend each institution.

11.2 The Board will allocate program funds to eligible institutions in proportion to each eligible institution's percentage of the total Federal Pell Grant funds received for Utah resident students and students who qualified for resident tuition in the most recently completed award year by all participating institutions.

R620-12 Grant Deferrals:

12.1. Institutions shall develop a process for recipients to apply for deferrals or leaves of absence, which may be granted for military service, humanitarian/religious service, documented medical reasons, and other exigent reasons.

R620-13 Grant Cancellation: If a recipient does not return to pursue their degree after a deferral, or no longer meets the eligibility requirements, their grant will be canceled, and no remaining funds will be released.

R620-14 Reporting

14.1. As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other Promise Grant award information for the most recently completed fiscal year.

14.2. The Office of the Commissioner may, at any time, request additional documentation or data related to the Utah Promise Program Grant and may review or formally audit an institution's documentation and compliance with this policy.

14.3 By March 1 of each year, participating institutions financial aid directors will report to the Board the total dollar amount of Federal Pell Grant funds awarded to resident students and students who qualified for resident tuition under Utah Code section 53B-8-106 at the institution for the most recently completed academic year.

14.4 An institution that fails to submit the required reports by the required deadlines may be ineligible to participate in the program for the next fiscal year.

R620-15 Administrative Costs: The Board may use up to 3% of the money appropriated for the Utah Promise Program to cover administrative costs.

R620-16 Institutional Participation Agreement: Each participating institution will enter into a written agreement with the Board or assigned designee agreeing to abide by the program policies, accept and disburse funds per program rules, provide the required report each year, and retain documentation for the program to support the awards and actions taken. By accepting the funds, the participating institution agrees to the additional following terms and conditions:

16.1 The institution may at its discretion use up to 3% of the funds it receives for the Utah Promise Program to cover administrative costs.

16.2 The institution may not carry forward or carry back from one award year to another any of its Promise Grant allocation. Any exception to this rule must be approved in advance by the Board. The institution will inform the Board immediately if it determines it will not be able to utilize all program funds allotted to it for an award year. Absent any exception for a carry forward amount, institutions shall return unused funds to the Board. The Board will redistribute unused to the other eligible institutions as supplemental Promise Grant allocations for disbursement during the same award year. The portion of Promise Grant allocations budgeted for administrative expenses pursuant to subsection 18.1 will not be part of any carryover.

R620-17 Report to Higher Education Appropriations Subcommittee:

Annually, the Board shall submit an electronic report to the Higher Education Appropriations Subcommittee about the Utah Promise Program.

R621, Terrel H. Bell Education Scholarship Program

R621-1 Purpose: To provide procedures for administration of the Terrel H. Bell Teaching Education Scholarship Program, ensuring it recruit first-generation students into teaching careers, encourages outstanding students to teach in high needs areas in Utah's public schools, and to recognize teaching as a critically important career choice for the state of Utah.

R621-2 References

- 2.1 [Utah Code § 53B-8-114](#), Terrel H. Bell Education Scholarship Program
- 2.2 [Utah Code Title 53E, Chapter 6, Section 3](#), Education Professional Licensure

R621-3 Definitions

3.1 “Approved Program” means:

3.1.1 A teacher preparation program that meets the education profession licensure standards described in Section [53E-6-302](#), and provides enhanced clinical experiences, or prepares an individual to become a speech-language pathologist or another licensed professional providing services in a public school to students with disabilities.

3.1.2 Courses taken at Salt Lake Community College or Snow College that lead students to make reasonable progress to meet institutional criteria for admission into a program in accordance with section 3.1.1. of this policy.

3.2 “Eligible Institution” means a public or private institution of higher education in Utah that offers an approved program.

3.3 “High Needs Area” means a subject area or field in public education that has a high need for teachers or other employees, determined annually by the Board in consultation with State Board of Education.

3.4. “First -Generation Student” means [a student whose parents never completed college or beyond](#). ~~a student for whom no parent or guardians attained a bachelor's degree.~~

3.5 “Full-time Enrollment” means 12 semester hours or such other number of hours as determined by the recipient's institution. [\[1\]](#)

3.6 “Part-time Enrollment” means a minimum of 6 credits in a semester.

3.7 “Average Scholarship Amount” means average USHE undergraduate resident tuition and general student fees for the corresponding academic year.

R621-4 General Award Conditions

4.1 Scholarship Award: Under this program, an eligible institution may award a scholarship to an individual for an amount up to the cost of resident tuition, fees, and books for the number of credit hours in which the individual is enrolled each semester.

4.1.1 An eligible private institution may not award a scholarship for an amount that exceeds the average scholarship amount granted by a public institution of higher education.

4.1.2 A recipient may receive a scholarship for up to four consecutive years, or equivalent when considering institution-approved leaves of absence.

4.1.3 Eligible institutions may award scholarships to full-time or part-time enrolled students.

4.2 Application and Award Procedures

4.2.1 An eligible institution shall develop processes for promoting and distributing awards consistent with this policy, and will set application deadlines that accommodate both full-time and part-time students.

4.2.2 Applications must require a student’s declaration to earn a degree in an approved program.

4.3 Prioritizing Awards: Institution shall prioritize scholarship awards as follows:

4.3.1 First, to first-generation students who intend to work in any area in a Utah public school.

4.3.2 Second, to students who are not ~~first-generation~~[first-generation](#) students but intend to work in high needs area in a Utah public school.

4.3.3 Third, to students who meet the requirements in Section 5 of this policy.

R621-5 Initial and Continuing Eligibility of Students

5.1 Applicants must declare their intent to earn a degree in an approved program and to teach in a Utah public school after graduation.

5.2 Award recipients must maintain satisfactory academic progress in accordance with their institution’s policies.

5.3 A recipient must make reasonable progress to meet institutional criteria for admission to an approved program. Once admitted to an approved program a recipient must maintain reasonable progress towards completion of an approved program.

5.4 Recipients transferring to another eligible institution will retain an award if they continue to meet criteria established for recipients at the receiving institution.

5.5 After no more than four semesters of full-time, or eight semesters of part-time postsecondary course work, a recipient must apply and be accepted into an approved program at an eligible institution.

5.6 A recipient who has not been accepted into an approved program at an eligible institution may be granted a temporary deferment of an award for up to two years while seeking acceptance into an approved program.

5.7 After providing a recipient notice and an opportunity to respond, an institution may rescind a recipient's scholarship if the dean of education or the director of financial aid determines the recipient:

5.7.1 is failing to make reasonable progress toward completion of program requirements, or

5.7.2 has demonstrated to a reasonable certainty that he or she does not intend to teach at a public school in Utah after graduation.

5.8 [Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for this scholarship.](#)

5.98 Appeals: Upon request by the student, the institution shall provide an opportunity for the student to appeal a dean or director's determination to rescind the scholarship to a committee of at least three impartial persons.

5.109 Leaves of Absence: A recipient may seek leave of absence from attending an institution in accordance with applicable deferral policies at a corresponding eligible institution.

R621-6 Transfer of Award Funds

6.1 Recipients may transfer to another eligible institution and retain the scholarship if they meet all requirements of the receiving institution. Transfer students are ultimately responsible for communicating with colleges/schools of education and financial aid offices at receiving institutions well in advance. Transfer students who do not meet application deadlines or demonstrate satisfactory academic progress may have their scholarship rescinded. The receiving institution is responsible to make any adjustments in a recipient's award.

R621-7 Distribution of Award Funds to Institutions

7.1 The Board will annually distribute available funds to eligible institutions proportionally equal to the total number of teachers who graduated from an eligible institution and were hired by a Utah public school district for the most recent three cohort years available, minus funds for Snow College and Salt Lake Community College allocated at the discretion of the Board.

R621-8 Reporting

8.1 As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other TH Bell Scholarship information for the most recently completed fiscal year.

~~**8.1** On or before June 30 each year, eligible institutions shall report to the Board of Higher Education the following:~~

~~**8.1.1** Any new or procedures, application materials.~~

~~**8.1.2** The name and student identification number, first-generation status, and specific enrolled program of all recipients to whom the institution awarded scholarship funds the current academic year.~~

~~**8.1.3** The scholarship amount each recipient received.~~

~~**8.1.4** The number of first-generation recipients.~~

8.2 The Board of Higher Education may, at any time, request additional documentation or data related to the T.H. Bell Scholarship and may review or formally audit an institution's compliance with this policy.

Adopted May 17, 2019; amended XXX

R621, Terrel H. Bell Education Scholarship Program¹

R621-1 Purpose: To provide procedures for administration of the Terrel H. Bell Teaching Education Scholarship Program, ensuring it recruit first-generation students into teaching careers, encourages outstanding students to teach in high needs areas in Utah's public schools, and to recognize teaching as a critically important career choice for the state of Utah.

R621-2 References

- 2.1 [Utah Code § 53B-8-114](#), Terrel H. Bell Education Scholarship Program
- 2.2 [Utah Code Title 53E, Chapter 6, Section 3](#), Education Professional Licensure

R621-3 Definitions

3.1 “Approved Program” means:

3.1.1 A teacher preparation program that meets the education profession licensure standards described in Section [53E-6-302](#), and provides enhanced clinical experiences, or prepares an individual to become a speech-language pathologist or another licensed professional providing services in a public school to students with disabilities.

3.1.2 Courses taken at Salt Lake Community College or Snow College that lead students to make reasonable progress to meet institutional criteria for admission into a program in accordance with section 3.1.1. of this policy.

3.2 “Eligible Institution” means a public or private institution of higher education in Utah that offers an approved program.

3.3 “High Needs Area” means a subject area or field in public education that has a high need for teachers or other employees, determined annually by the Board in consultation with State Board of Education.

3.4. “First -Generation Student” means an student whose parents never completed college or beyond..

3.5 “Full-time Enrollment” means 12 semester hours or such other number of hours as determined by the recipient's institution. [\[1\]](#)

¹ Adopted May 17, 2019; amended XXX

- 3.6 “Part-time Enrollment”** means a minimum of 6 credits in a semester.
- 3.7 “Average Scholarship Amount”** means average USHE undergraduate resident tuition and general student fees for the corresponding academic year.

R621-4 General Award Conditions

4.1 Scholarship Award: Under this program, an eligible institution may award a scholarship to an individual for an amount up to the cost of resident tuition, fees, and books for the number of credit hours in which the individual is enrolled each semester.

4.1.1 An eligible private institution may not award a scholarship for an amount that exceeds the average scholarship amount granted by a public institution of higher education.

4.1.2 A recipient may receive a scholarship for up to four consecutive years, or equivalent when considering institution-approved leaves of absence.

4.1.3 Eligible institutions may award scholarships to full-time or part-time enrolled students.

4.2 Application and Award Procedures

4.2.1 An eligible institution shall develop processes for promoting and distributing awards consistent with this policy, and will set application deadlines that accommodate both full-time and part-time students.

4.2.2 Applications must require a student’s declaration to earn a degree in an approved program.

4.3 Prioritizing Awards: Institution shall prioritize scholarship awards as follows:

4.3.1 First, to first-generation students who intend to work in any area in a Utah public school.

4.3.2 Second, to students who are not first-generation students but intend to work in high needs area in a Utah public school.

4.3.3 Third, to students who meet the requirements in Section 5 of this policy.

R621-5 Initial and Continuing Eligibility of Students

5.1 Applicants must declare their intent to earn a degree in an approved program and to teach in a Utah public school after graduation.

5.2 Award recipients must maintain satisfactory academic progress in accordance with their institution's policies.

5.3 A recipient must make reasonable progress to meet institutional criteria for admission to an approved program. Once admitted to an approved program a recipient must maintain reasonable progress towards completion of an approved program.

5.4 Recipients transferring to another eligible institution will retain an award if they continue to meet criteria established for recipients at the receiving institution.

5.5 After no more than four semesters of full-time, or eight semesters of part-time postsecondary course work, a recipient must apply and be accepted into an approved program at an eligible institution.

5.6 A recipient who has not been accepted into an approved program at an eligible institution may be granted a temporary deferment of an award for up to two years while seeking acceptance into an approved program.

5.7 After providing a recipient notice and an opportunity to respond, an institution may rescind a recipient's scholarship if the dean of education or the director of financial aid determines the recipient:

5.7.1 is failing to make reasonable progress toward completion of program requirements, or

5.7.2 has demonstrated to a reasonable certainty that he or she does not intend to teach at a public school in Utah after graduation.

5.8 Under Utah Code 63G-12-402, verification of lawful presence in the United States is not required to be eligible for this scholarship.

5.9 Appeals: Upon request by the student, the institution shall provide an opportunity for the student to appeal a dean or director's determination to rescind the scholarship to a committee of at least three impartial persons.

5.10 Leaves of Absence: A recipient may seek leave of absence from attending an institution in accordance with applicable deferral policies at a corresponding eligible institution.

R621-6 Transfer of Award Funds

6.1 Recipients may transfer to another eligible institution and retain the scholarship if they meet all requirements of the receiving institution. Transfer students are ultimately responsible for communicating with colleges/schools of education and financial aid offices at receiving institutions well in advance. Transfer students who do not meet application deadlines or demonstrate satisfactory academic progress may have their scholarship rescinded. The

receiving institution is responsible to make any adjustments in a recipient's award.

R621-7 Distribution of Award Funds to Institutions

7.1 The Board will annually distribute available funds to eligible institutions proportionally equal to the total number of teachers who graduated from an eligible institution and were hired by a Utah public school district for the most recent three cohort years available, minus funds for Snow College and Salt Lake Community College allocated at the discretion of the Board.

R621-8 Reporting

8.1 As specified by the Office of the Commissioner, each institution shall provide, as part of an annual institutional financial aid file submission by February 28 of each year, data pertaining to applications, awards, program enrollments, utilization, funding, and/or other TH Bell Scholarship information for the most recently completed fiscal year.

8.2 The Board of Higher Education may, at any time, request additional documentation or data related to the T.H. Bell Scholarship and may review or formally audit an institution's compliance with this policy.

R623, Free Application for Federal Student Aid

R623-1 Purpose: Require applicants for certain state scholarships to complete [either](#) the Free Application for Federal Student Aid [or the Board's alternative financial form](#) to ensure applicants have leveraged all available federal financial aid to cover the cost of higher education, provide instruction for applicants to opt out of the requirements of this policy and provide instructions to financial aid officers.

R-623-2 References

2.1 [Board Policies 603 through 622](#)

R-623-3 Definitions

3.1 Free Application for Federal Student Aid (FAFSA) The financial reporting forms used to determine the need and eligibility of a student for financial assistance as described in 20 USC 1089.

R-623-4 Policy

4.1 Institutions shall require applicants for ~~the following~~ scholarship [and grant programs administered by the Boards](#) to complete [either the alternative financial form available at ushe.edu or](#) the FAFSA to —the extent that it will benefit an individual student's ability to maximize financial aid opportunities:

~~4.1.1 Terrel H. Bell Education Scholarship Program—Board Policy R621~~

~~4.1.2 New Century Scholarship—Board Policy R604~~

~~4.1.3 Higher Education Success Stipend Program—Board Policy R605~~

~~4.1.4 Veterans Tuition Gap Program—Board Policy R611~~

~~4.1.5 Career and Technical Education Scholarship Program—Board Policy R622~~

4.2 Applicant Opt Out: An applicant may opt out of the requirement to complete the [alternative financial form and the](#) FAFSA due to:

4.2.1 Financial ineligibility for any potential grant or other financial aid;

4.2.2 Personal privacy concerns; or

4.2.3 Advice of the institution based on its assessment of the factors that may impact a student's ability to access maximum financial aid opportunities.

4.3 Institution advisors shall, to the extent practicable, encourage all of students to annually complete the [alternative financial form or the](#) FAFSA.

4.4 Institutions shall ensure staff and faculty who advise students on financial aid are properly trained on the benefits of completing the FAFSA.

Adopted May 15, 2020; [amended XXX](#)

R623, Free Application for Federal Student Aid¹

R623-1 Purpose: Require applicants for certain state scholarships to complete either the Free Application for Federal Student Aid or the Board's alternative financial form to ensure applicants have leveraged all available federal financial aid to cover the cost of higher education, provide instruction for applicants to opt out of the requirements of this policy and provide instructions to financial aid officers.

R-623-2 References

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3.1 Free Application for Federal Student Aid (FAFSA) The financial reporting forms used to determine the need and eligibility of a student for financial assistance as described in 20 USC 1089.

R-623-4 Policy

4.1 Institutions shall require applicants for scholarship and grant programs administered by the Board to complete either the alternative financial form available at ushe.edu or the FAFSA to the extent that it will benefit an individual student's ability to maximize financial aid opportunities:

4.2 Applicant Opt Out: An applicant may opt out of the requirement to complete the alternative financial form and the FAFSA due to:

4.2.1 Financial ineligibility for any potential grant or other financial aid;

4.2.2 Personal privacy concerns; or

4.2.3 Advice of the institution based on its assessment of the factors that may impact a student's ability to access maximum financial aid opportunities.

4.3 Institution advisors shall, to the extent practicable, encourage all of students to annually complete the alternative financial form or the FAFSA.

4.4 Institutions shall ensure staff and faculty who advise students on financial aid are properly trained on the benefits of completing the FAFSA.

¹ Adopted May 15, 2020; amended XXX

R624, Utah Promise Partners Program¹

R624-1 Purpose: The Utah Promise Grant is a statewide need-based grant program that expands access to postsecondary opportunities to all. This policy outlines the Utah Board of Higher Education's ("Board") policy and procedures for administering the Utah Promise Program.

R624-2 References

2.1 Utah Code 53B-13a-107, Utah Promise Partners

R624-3 Definitions

3.1 "Institution" means an institution of higher education under Utah Code section 53B-2-101(1).

3.2 "Promise Partner Award" means an award given to an eligible employee of a Promise Partner under this policy.

3.3 "Promise Partner" means an employer that has applied to, and established a Memorandum of Understanding with, the Board.

R624-4 Utah Promise Partners: The Board, in consultation with the Talent Ready Utah Program, may select, as a Promise Partner, an employer who applies to the Board and meets other requirements established by the Board.

R624-5 Employee Qualifications

5.1 An employee who works for a Promise Partner is eligible to receive an award under this policy if:

5.1.1 The employee completes the application process approved by the Board;

5.1.2 Is admitted to, and enrolled in, a Utah System of Higher Education institution; and

5.1.3 Meets other requirements established by the Promise Partner.

5.2 The student must meet the eligibility requirements outlined in subsection 5.1 for the full-length of time the student receives the award.

¹ Adopted XXX

R624-6 Application Process

6.1 Promise Partners shall establish an application process consistent with this policy that applicants can easily access and complete.

6.2 The Board, in consultation with the partner, shall set deadlines by which applicants must submit all required materials.

R624-7 Award: Subject to funding, the Board may:

7.1 Give a Promise Partner Award for the portion of tuition and fees for a program at an institution that is not covered by a Promise Partner reimbursement;

7.2 Prioritize awarding Promise Partner Awards if an appropriation for Promise Partner Awards is insufficient to provide a Promise Partner Award to each eligible applicant.

R624-8 Award Duration: The Board may continue to award a Promise Partner Award to an eligible recipient until the earlier of either:

8.1 Two years after the recipient receives a Promise Partner Award;

8.2 The recipient uses the Promise Partner Award to attend an institution for four semesters;

8.3 The recipient completes the requirements for an associate degree; or

8.4 The recipient attends an institution that does not offer associate degrees, and the recipient has earned 60 credit hours.

R624-9 Report to Higher Education Appropriations Subcommittee:

Annually, the Board shall submit an electronic report to the Higher Education Appropriations Subcommittee about the Utah Promise Program, including Utah Promise Partners.