

Tab F – Paying For College



UTAH SYSTEM OF
HIGHER EDUCATION

Building a Stronger State of Minds

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PAYING FOR COLLEGE

This tab contains information on student financial aid programs in the Utah System of Higher Education (USHE). Similar programs are grouped together in different sections of the report. The sections are:

- I. State Student Financial Access Programs
- II. Federal Campus-Based Student Financial Aid
- III. Program-Based Student Financial Aid
- IV. Statutory Tuition Waivers
- V. Tuition Set Asides for Need-Based Financial Aid

I. STATE STUDENT FINANCIAL ACCESS PROGRAMS

INTRODUCTION

The following tables provide statistical information for two state sponsored programs administered by the Utah Higher Education Assistance Authority: the Utah Educational Savings Plan Trust (UESP) and the Higher Education Success Stipend Program (HESSP) – formerly UCOPE, described in further detail below.

UTAH EDUCATIONAL SAVINGS PLAN TRUST (UESP)

About UESP

The Utah Educational Savings Plan (UESP) is a nonprofit 529 college savings plan, authorized by the Utah State Legislature in 1996 and designed to comply with Section 529 of the Internal Revenue Code. Administered and managed by the Utah State Board of Regents and the Utah Higher Education Assistance Authority (UHEAA), UESP is the official and only 529 plan sponsored by the State of Utah.



As a direct-sold college savings plan, UESP is dedicated to one purpose: helping families save for college. UESP never pitches account owners additional products or services, such as retirement plans or insurance.

Tax Advantages

- Earnings on investments in UESP accounts grow tax-deferred from federal and Utah state income taxes, and are tax-exempt when used for qualified higher education expenses.
- Utah taxpayer account owners and trusts may claim a 5 percent Utah state income tax credit each year for contributions to their accounts up to certain limits *per qualified beneficiary*. Utah corporations may deduct contributions to their UESP accounts up to a certain limit *per qualified beneficiary*. For an account owner to be eligible for the Utah state income tax credit or deduction, the beneficiary of the UESP account must be designated as such before age 19.

Use of Funds

- Money in a UESP account may be used for a beneficiary's qualified higher education expenses, including tuition and fees; required books, supplies, and equipment (including computers, if required by the school); and certain room-and-board costs.
- The funds may be used at any accredited technical school, college, or university that participates in federal financial aid programs for students in the United States or abroad, not just at institutions in Utah. Visit fafsa.ed.gov for a list of eligible schools.

Flexibility

- UESP requires no minimum or ongoing contributions to open an account. An account owner/agent may open an account with a zero balance and start saving when the time is right.
- A beneficiary may be anyone, of any age, with a valid U.S. Social Security or Taxpayer Identification Number.
- A beneficiary may be changed at any time to another member of the beneficiary's family. Please note that if the beneficiary is changed from someone younger than age 19 to someone who is age 19 or older, the account owner must recapture (add back) Utah state income tax credits or deductions claimed in any prior tax year.
- UESP allows the account owner/agent to be changed at any time, as long as the account owner/agent is at least age 18 and has a valid U.S. Social Security or Taxpayer Identification Number.

Investment Options

An account owner/agent may choose from 14 investment options UESP offers. Choices include:

- Four age-based investment options
- Eight static investment options
- Two customized investment options

With a low average asset-weighted fee, UESP is a low-cost leader in the 529 plan industry. UESP charges no fees to Utah residents who select the Public Treasurers' Investment Fund investment option. For more information about UESP or to request a copy of the Program Description, visit uesp.org, call 800.418.2551 toll-free, or send an email to info@uesp.org.

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Read the Program Description for more information and consider all investment objectives, risks, charges, and expenses before investing. Call 800.418.2551 for a copy of the Program Description or visit uesp.org.

Investments in UESP are not guaranteed by UESP, the Utah State Board of Regents, the Utah Higher Education Assistance Authority (UHEAA) or any other state or federal agency. However, Federal Deposit Insurance Corporation (FDIC) insurance is provided for the FDIC-insured accounts. Please read the Program Description to learn about the FDIC-insured accounts. Your investment could lose value.

Non-Utah taxpayers and residents: You should determine whether the state in which you or your beneficiary pays taxes or lives offers a 529 plan that provides state tax or other benefits not otherwise available to you by investing in UESP. You should consider such state tax treatment and benefits, if any, before investing in UESP.

HIGHER EDUCATION SUCCESS STIPEND PROGRAM (HESSP)

HESSP (formerly UCOPE) is a state supplement grant and work-study assistance award established by the Utah State Legislature. Program funds may be used for either grants or work-study awards to Utah resident students with demonstrated financial need, using the federal needs analysis methodology. HESSP funds are allotted to participating eligible institutions based on population of resident students with high financial need as evidenced by award of Federal Pell Grants. In addition to USHE institutions, Brigham Young University, Westminster College, LDS Business College, and the UCAT campuses participate in the HESSP Program.

VETERANS TUITION GAP PROGRAM (VET GAP)

VeT Gap is a state supplement grant to provide tuition assistance for veterans who are recipients of Federal Post-9/11 Veterans Educational Assistance Act (federal program) benefits who are attending institutions of higher education in Utah and whose benefits under the federal program have been exhausted. This program is only available to higher education institutions that grant baccalaureate degrees. Eligible Veterans must be in the last year of their first baccalaureate degree program. Awards can be up to the cost of tuition only. Allocations are based on the number of Veterans (using post 9/11 benefits) a participating school has graduated in the last year as a ratio to the total for all participating schools.

Table 1

Utah Education Savings Plan Trust (UESP)
Number of Accounts and Total Assets by Fiscal Year

Fiscal Year Ending June 30	Number of Accounts	Total Assets (in thousands)
2001	7,800	\$42,000
2002	23,600	\$218,000
2003	35,900	\$431,000
2004	45,600	\$474,000
2005	59,700	\$1,098,000
2006	76,700	\$1,535,000
2007	98,400	\$2,286,000
2008	126,300	\$2,568,000
2009	142,900	\$2,413,000
2010	162,300	\$3,095,000
2011	182,200	\$4,197,000
2012	203,300	\$4,694,000
2013	226,100	\$5,843,000
2014	257,400	\$7,433,000
2015	287,900	\$8,357,000

Table 2

Higher Education Success Stipend Program (HESSP)

Fiscal Year Ending June 30, 2015

Institution	Grant Award		Work Study Award		Administrative Expense	Total Expended
	#	\$	#	\$	\$	\$
U of U	412	313,310	0	0	9,690	323,000
USU	81	80,675	63	239,970	10,077	330,722
WSU	207	361,513	10	4,250	0	365,763
SUU	197	70,200	59	31,441	0	101,641
SNOW	132	56,710	0	0	0	56,710
DSU	66	51,000	54	116,952	4,948	172,900
UVU	1,013	489,753	0	0	15,147	504,900
SLCC	528	415,074	0	0	1,226	416,300
TOTAL USHE	2,636	\$ 1,838,235	186	\$ 392,613	\$ 41,088	\$ 2,271,936
BYU	65	160,200	0	0	0	160,200
LDSBC	26	10,200	0	0	0	10,200
WESTMINSTER	12	19,500	0	0	0	19,500
TOTAL PRIVATE	103	\$ 189,900	0	\$ -	\$ -	\$ 189,900
UCAT	126	\$ 52,163	0	\$ -	\$ 537	\$ 52,700
FINAL TOTALS	2,865	\$ 2,080,298	186	\$ 392,613	\$ 41,625	\$ 2,514,536

Notes:

(1) HESSP data is compiled from annual reports provided by the participating institutions for the 2015 award year.

Veteran Tuition Grant Program (VeT Gap)
Fiscal Year Ending June 30, 2015

Institution	Awards		Administrative Expense	Total Expended
	#	\$	\$	\$
University of Utah	12	38,883	1,824	40,707
Utah State University	0	0	0	0
Weber State University	5	10,818	320	11,138
Southern Utah University	1	889	0	889
Dixie State University	2	3,476	255	3,731
Utah Valley University	1	2,635	0	2,635
TOTAL USHE	21	\$ 56,701	\$ 2,399	\$ 59,100
Western Governors University	2	4,722	273	4,995
Westminster College	2	5,700	0	5,700
TOTAL PRIVATE NOT-FOR-PROFIT	4	\$ 10,422	\$ 273	\$ 10,695
Art Institute of Salt Lake City	3	5,700	0	5,700
Broadview University - Layton	0	0	0	0
Broadview University - Orem	0	0	0	0
Broadview University - West Jordan	1	2,300	0	2,300
Everest College	5	2,800	0	2,800
TOTAL FOR-PROFIT	9	\$ 10,800	\$ -	\$ 10,800
FINAL TOTALS	34	\$ 77,923	\$ 2,672	\$ 80,595

Notes:

(1) VeT Gap data is compiled from annual reports provided by the participating institutions for the 2015 award year.

II. FEDERAL CAMPUS-BASED STUDENT FINANCIAL AID

INTRODUCTION

The following tables provide statistical information concerning a number of federally-supported student financial aid programs. These programs all are campus-based, as operated in Utah. Awards under all four programs are required to be based on demonstrated financial need. Annual state appropriations to the Board of Regents provide part of the required matching funds for the Federal Work Study (FWS) Program, and all required matching funds for the other two programs (Pell Grants do not require matching funds) for USHE institutions.

FEDERAL PERKINS LOANS

The Federal Perkins Loan Program provides low interest (five percent) loans with a maximum 10 year repayment period to students with exceptional financial need. The matching requirement in this program is 25 percent of the capital contributions to the institutional loan fund. *Congress has not funded the Perkins Loan Program since Fiscal Year 2006; however institutions continue to disburse program funds from prior year contributions.*

FEDERAL WORK-STUDY (FWS)

The FWS Program provides jobs for financially needy undergraduate and graduate students who qualify for financial aid. Employers pay a portion of the students' wages while the FWS funds pay the remainder. Funding for the FWS Program is received directly from the U.S. Department of Education (ED). Institutions are required to provide an annual match representing 25 percent of total FWS funds.

FEDERAL PELL GRANTS

The Federal Pell Grant Program is the largest federal student financial aid grant program. Federal Pell Grants are need-based awards to undergraduate students. Eligibility for Pell Grants is limited to students with the *greatest* financial need. Funding for the Federal Pell Grant Program comes directly from ED to the individual campuses. The Pell Grant Program is provided to every eligible applicant. For the 2014-2015 award year the maximum grant amount was \$5,730.

FEDERAL SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANTS (FSEOG)

The FSEOG Program is a grant program for undergraduate students with exceptional need. Awards of up to \$4,000 per year are available depending on the student's need and availability of funds. Funding for the program is provided by ED. The state matching requirement is 33 percent of federal funds (25 percent of total funds).

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2005-06		2006-07		2007-08		2008-09		2009-2010	
	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount
UU Perkins Loan	1,645	\$4,993,762	2,271	\$6,360,511	971	\$2,806,430	1,089	\$2,518,406	1,485	\$3,273,659
FWS	413	\$1,306,384	429	\$1,442,092	441	\$1,508,949	390	\$1,263,064	447	\$1,617,816
FSEOG	1,941	\$1,019,868	1,533	\$888,947	1,691	\$889,880	3,006	\$1,078,773	1,607	\$1,172,474
LEAP	1,218	\$424,500	1,131	\$417,700	1,206	\$421,280	1,206	\$421,280	583	\$406,620
Pell	5,871	\$13,989,119	5,370	\$12,737,927	5,010	\$12,228,721	4,882	\$13,663,216	6,204	\$21,110,783
TOTAL		\$21,733,633		\$21,847,177		\$17,855,260		\$18,944,739		\$27,581,352
USU Perkins Loan	1,651	\$2,509,800	844	\$2,198,492	870	\$2,313,153	319	\$873,418	434	\$1,181,471
FWS	405	\$988,439	374	\$922,920	595	\$1,349,830	698	\$1,728,761	594	\$1,601,487
FSEOG	1,141	\$808,562	1,123	\$815,777	1,063	\$871,244	1,023	\$854,960	1,041	\$828,376
LEAP	400	\$316,800	391	\$318,000	341	\$301,500	313	\$275,800	328	\$304,000
Pell	6,353	\$15,717,722	5,872	\$14,246,824	5,727	\$14,902,741	5,798	\$17,188,871	7,358	\$27,028,704
TOTAL		\$20,341,323		\$18,502,013		\$19,738,468		\$20,921,810		\$30,944,038
WSU Perkins Loan	466	\$1,595,140	457	\$1,437,836	309	\$1,003,962	509	\$1,622,388	444	\$1,405,161
FWS	249	\$594,879	198	\$535,376	202	\$543,628	317	\$799,795	448	\$1,258,640
FSEOG	412	\$782,595	999	\$828,542	770	\$885,005	1,072	\$946,562	659	\$566,285
LEAP	130	\$273,600	315	\$264,100	227	\$253,400	262	\$225,200	312	\$244,500
Pell	5,227	\$11,636,693	4,708	\$10,657,295	4,483	\$10,491,219	4,654	\$12,174,809	6,404	\$21,823,012
TOTAL		\$14,882,907		\$13,723,149		\$13,177,214		\$15,768,754		\$25,297,598
SUU Perkins Loan	116	\$381,587	140	\$385,793	149	\$441,058	62	\$186,918	75	\$186,918
FWS	338	\$284,347	313	\$284,350	293	\$284,347	232	\$284,371	236	\$284,348
FSEOG	1,060	\$210,935	961	\$195,348	816	\$195,348	603	\$194,998	570	\$185,448
LEAP	109	\$96,800	213	\$102,200	160	\$99,800	172	\$91,200	130	\$90,672
Pell	2,473	\$6,531,005	2,329	\$5,961,928	2,157	\$5,869,114	2,265	\$7,029,574	2,952	\$11,734,843
TOTAL		\$7,504,674		\$6,999,619		\$6,889,667		\$7,787,054		\$12,491,249
SNOW Perkins Loan	6	\$15,325	2	\$4,500	0	\$0	0	\$0	0	\$0
FWS	140	\$111,306	136	\$128,078	121	\$118,121	119	\$127,613	114	\$124,718
FSEOG	409	\$117,100	412	\$109,524	319	\$121,701	314	\$109,524	301	\$109,524
LEAP	141	\$49,700	133	\$51,800	152	\$50,700	108	\$45,400	154	\$47,000
Pell	1,113	\$2,655,078	934	\$2,281,370	800	\$2,021,773	863	\$2,436,725	1,276	\$4,658,083
TOTAL		\$2,948,509		\$2,575,272		\$2,312,295		\$2,719,262		\$4,939,325
DSU Perkins Loan	191	\$628,113	135	\$486,088	97	\$338,385	102	\$339,374	68	\$246,392
FWS	104	\$234,371	97	\$244,340	71	\$203,933	65	\$213,858	86	\$202,185
FSEOG	685	\$135,331	402	\$118,950	475	\$155,039	434	\$134,591	336	\$138,967
LEAP	170	\$76,800	138	\$75,100	98	\$71,100	107	\$62,700	124	\$69,500
Pell	1,916	\$4,311,167	1,745	\$3,849,644	1,761	\$4,189,347	2,373	\$6,538,252	4,103	\$14,558,351
TOTAL		\$5,385,782		\$4,774,122		\$4,957,804		\$7,288,775		\$15,215,395
CEU Perkins Loan	40	\$80,038	19	\$42,094	28	\$52,944	20	\$44,046	14	\$44,046
FWS	37	\$53,541	29	\$43,550	38	\$53,568	38	\$51,741	20	\$20,283
FSEOG	102	\$74,534	93	\$69,660	54	\$39,215	70	\$52,305	66	\$53,630
LEAP	74	\$37,700	64	\$34,600	62	\$28,469	46	\$23,873	35	\$26,100
Pell	819	\$2,045,418	619	\$1,562,878	539	\$1,347,201	621	\$1,801,539	901	\$3,204,529
TOTAL		\$2,291,231		\$1,752,782		\$1,521,397		\$1,973,504		\$3,327,998
UVU Perkins Loan	60	\$148,449	160	\$460,135	133	\$354,511	45	\$129,326	64	\$174,000
FWS	366	\$1,199,356	374	\$1,202,709	208	\$612,185	283	\$807,991	179	\$715,072
FSEOG	1,608	\$1,279,585	1,495	\$1,186,648	1,656	\$767,866	1,080	\$520,984	1,887	\$451,986
LEAP	904	\$290,400	822	\$278,800	1,102	\$257,800	750	\$235,500	1,001	\$271,800
Pell	7,692	\$17,099,217	7,464	\$16,391,975	7,298	\$17,293,122	8,205	\$22,055,335	12,007	\$42,514,124
TOTAL		\$20,017,007		\$19,520,267		\$19,285,484		\$23,749,136		\$44,126,982
SLCC Perkins Loan	296	\$739,404	506	\$810,510	443	\$899,477	260	\$603,173	305	\$605,934
FWS	187	\$451,279	132	\$338,804	132	\$325,811	190	\$431,758	198	\$475,283
FSEOG	591	\$423,438	549	\$381,763	560	\$409,444	449	\$365,825	504	\$378,562
LEAP	452	\$324,000	447	\$327,300	452	\$313,000	328	\$282,700	350	\$318,800
Pell	6,761	\$13,360,477	5,879	\$11,326,298	5,530	\$11,176,301	6,427	\$14,617,064	10,807	\$32,212,720
TOTAL		\$15,298,598		\$13,184,675		\$13,124,033		\$16,300,520		\$33,991,299
TOTAL Perkins Loan	4,471	\$11,091,618	4,534	\$12,255,959	3,000	\$8,209,920	2,406	\$6,317,042	2,889	\$7,106,011
USHE FWS	2,239	\$5,223,902	2,082	\$5,142,219	2,101	\$5,000,372	2,332	\$5,708,952	2,322	\$6,299,832
FSEOG	7,949	\$4,851,948	7,567	\$4,595,159	7,404	\$4,334,742	8,051	\$4,258,522	6,971	\$3,885,252
LEAP	3,598	\$1,890,300	3,654	\$1,869,600	3,800	\$1,797,049	3,292	\$1,663,653	3,017	\$1,778,992
Pell	38,225	\$87,345,896	34,920	\$79,016,139	33,305	\$79,519,539	36,088	\$97,505,385	52,012	\$178,845,149
TOTAL		\$110,403,664		\$102,879,076		\$98,861,622		\$115,453,554		\$197,915,236

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2010-11		2011-12		2012-13		2013-14		2014-15		
	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	
UU	Perkins Loan	1,342	\$3,056,533	1,849	\$4,145,697	1,787	\$4,047,324	1,950	\$4,133,316	1,888	\$4,273,880
	FWS	425	\$1,442,206	405	\$1,407,502	391	\$1,360,896	413	\$1,433,811	397	\$1,268,181
	FSEOG	1,302	\$970,204	1,250	\$936,876	1,424	\$1,060,578	1,604	\$1,195,397	1,694	\$1,256,102
	LEAP	574	\$411,600	-	-	-	-	-	-	-	-
	Pell	7,986	\$30,596,971	8,880	\$32,232,699	8,917	\$32,800,048	8,368	\$31,491,456	7,956	\$30,003,457
	TOTAL		\$36,477,514		\$38,722,774		\$39,268,846		\$38,253,980		\$36,801,620
USU	Perkins Loan	797	\$2,153,545	803	\$1,854,836	1,090	\$2,613,171	872	\$1,944,077	526	\$878,493
	FWS	407	\$1,091,096	383	\$1,291,454	483	\$1,314,513	476	\$1,349,729	472	\$1,472,229
	FSEOG	2,442	\$826,261	1,360	\$919,379	1,359	\$952,393	1,332	\$922,388	1,167	\$921,088
	LEAP	393	\$308,000	-	-	-	-	-	-	-	-
	Pell	8,816	\$33,286,071	10,500	\$36,913,317	10,212	\$37,608,539	10,179	\$37,057,695	10,239	\$38,010,193
	TOTAL		\$37,664,973		\$40,978,986		\$42,488,616		\$41,273,889		\$41,798,457
WSU	Perkins Loan	356	\$1,016,561	65	\$177,437	231	\$789,032	432	\$1,283,714	299	\$788,493
	FWS	261	\$836,390	327	\$990,407	381	\$1,089,337	352	\$1,095,304	342	\$1,153,919
	FSEOG	669	\$590,858	959	\$670,513	1,355	\$670,839	1,118	\$596,426	791	\$513,717
	LEAP	270	\$247,400	-	-	-	-	-	-	-	-
	Pell	8,143	\$29,042,257	8,591	\$29,421,332	9,098	\$30,895,461	8,334	\$28,814,605	8,027	\$28,716,432
	TOTAL		\$31,733,466		\$31,259,689		\$33,444,669		\$31,790,049		\$31,262,561
SUU	Perkins Loan	87	\$268,826	88	\$253,700	111	\$343,323	127	\$433,500	100	\$335,011
	FWS	212	\$284,348	225	\$284,348	212	\$284,348	194	\$278,050	198	\$284,347
	FSEOG	499	\$195,348	457	\$195,348	545	\$198,604	556	\$192,091	560	\$195,348
	LEAP	199	\$109,700	-	-	-	-	-	-	-	-
	Pell	3,499	\$14,188,315	3,343	\$12,923,168	3,229	\$12,842,204	3,115	\$12,236,999	3,050	\$12,162,526
	TOTAL		\$15,046,537		\$13,656,564		\$13,668,479		\$13,140,640		\$12,977,232
SNOW	Perkins Loan	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
	FWS	87	\$110,835	74	\$95,191	82	\$96,504	83	\$120,900	90	\$114,394
	FSEOG	338	\$109,524	349	\$136,528	305	\$109,524	213	\$109,788	236	\$118,404
	LEAP	141	\$47,740	-	-	-	-	-	-	-	-
	Pell	1,607	\$6,103,966	1,626	\$5,915,921	1,600	\$5,822,523	1,518	\$6,596,082	1,639	\$6,051,331
	TOTAL		\$6,372,065		\$6,147,640		\$6,028,551		\$6,826,770		\$6,284,129
DSU	Perkins Loan	92	\$293,000	55	\$203,375	60	\$210,000	88	\$284,315	95	\$278,618
	FWS	101	\$247,091	107	\$285,363	102	\$254,323	118	\$315,977	111	\$301,110
	FSEOG	536	\$118,092	309	\$161,250	395	\$230,715	492	\$251,648	437	\$220,119
	LEAP	124	\$80,300	-	-	-	-	-	-	-	-
	Pell	5,207	\$19,773,229	5,594	\$19,280,928	4,971	\$17,742,978	4,638	\$16,734,247	4,483	\$15,924,152
	TOTAL		\$20,511,712		\$19,930,916		\$18,438,016		\$17,586,187		\$16,723,999
CEU	Perkins Loan	10	\$15,760	**	**	**	**	**	**	**	**
	FWS	28	\$41,363	**	**	**	**	**	**	**	**
	FSEOG	75	\$57,867	**	**	**	**	**	**	**	**
	LEAP	37	\$27,647	*	*	*	*	*	*	*	*
	Pell	1,210	\$4,392,056	**	**	**	**	**	**	**	**
	TOTAL		\$4,534,693		\$0		\$0		\$0		\$0
UVU	Perkins Loan	30	\$79,750	71	\$183,000	58	\$150,500	93	\$327,632	122	\$447,381
	FWS	407	\$1,171,133	156	\$558,488	235	\$712,765	333	\$818,482	154	\$32,369
	FSEOG	1,929	\$638,237	1,683	\$477,909	2,669	\$785,200	1,991	\$734,973	1,706	\$987,152
	LEAP	1,117	\$301,599	-	-	-	-	-	-	-	-
	Pell	14,800	\$56,003,580	15,821	\$55,636,977	14,908	\$52,403,553	13,463	\$47,703,090	13,254	\$47,199,077
	TOTAL		\$58,194,299		\$56,856,374		\$54,052,018		\$49,584,177		\$49,065,979
SLCC	Perkins Loan	297	\$547,427	303	\$562,585	276	\$529,256	394	\$694,097	306	\$697,540
	FWS	182	\$467,189	141	\$393,290	142	\$441,627	163	\$489,487	233	\$614,149
	FSEOG	510	\$588,206	643	\$532,942	479	\$3,698,900	725	\$630,583	856	\$731,871
	LEAP	412	\$323,600	-	-	-	-	-	-	-	-
	Pell	13,238	\$41,472,610	14,547	\$42,324,972	14,188	\$41,499,839	13,518	\$39,344,122	12,019	\$34,523,919
	TOTAL		\$43,399,032		\$43,813,789		\$46,169,622		\$41,158,289		\$36,567,479
TOTAL USHE	Perkins Loan	3,011	\$7,431,402	3,234	\$7,380,630	3,613	\$8,682,606	3,956	\$9,100,651	3,336	\$8,305,870
	FWS	2,110	\$5,691,651	1,818	\$5,020,680	2,028	\$5,554,313	2,132	\$5,901,740	1,997	\$5,640,698
	FSEOG	8,300	\$4,094,597	7,010	\$4,030,745	8,531	\$7,706,753	8,031	\$4,633,294	7,447	\$4,943,801
	LEAP	3,267	\$1,857,586	0	\$0	0	\$0	0	\$0	0	\$0
	Pell	64,506	\$234,859,055	68,902	\$234,649,314	67,123	\$231,615,145	63,133	\$219,978,296	60,667	\$212,591,087
	TOTAL		\$253,934,291		\$251,081,369		\$253,558,817		\$239,613,981		\$231,481,456

Notes:

(1) Perkins Loan, PELL, FWS, FSEOG expenditures compiled from Institutional FISAPs as of June 30 of AY 14-15.

(2) LEAP expenditures from institutions: LEAP Performance Report as of June 30 of AY 10-11.

* LEAP has not been funded by the Department of Education since 2011-2012.

** In 2011-12 CEU became a campus of USU (USU-Eastern) and all reporting now is through USU

III. PROGRAM-BASED STUDENT FINANCIAL AID

INTRODUCTION

The following tables provide statistical information for program-based student financial aid programs administered by the Office of the Commissioner or the Utah Higher Educational Assistance Authority (UHEAA) or USHE institutions. These programs are: (1) the Western Interstate Commission for Higher Education (WICHE) Exchange Program, (2) the Regional Dental Education Program (RDEP), (3) the Terrel H. Bell Teaching Incentive Loan (TIL) Program, and (4) the institutionally-based Educationally Disadvantaged Programs.

WESTERN INTERSTATE COMMISSION FOR HIGHER EDUCATION (WICHE)

WICHE's Professional Student Exchange Program enables students in 15 western states to enroll in selected out-of-state professional programs when those fields of study are not available at public institutions in their home state. Exchange students pay reduced levels of tuition and the state pays a support fee to the admitting schools to help cover the cost difference between resident and non-resident tuition.

REGIONAL DENTAL EXCHANGE PROGRAM (RDEP)

RDEP enables students each year to begin the study of dentistry. The first year of study is completed at the University of Utah School of Medicine. The final three years are completed through a contract with Creighton University, a private institution where students pay reduced tuition because of the RDEP contract. Beginning with the 2005 class, RDEP will function as a loan repayment program for students who are accepted to a School of Dentistry and RDEP, if they return to Utah to practice dentistry after graduation. With the inauguration of the new University of Utah School of Dentistry, the RDEP program will be retired when the last RDEP students complete their education in 2016.

TERREL H. BELL TEACHING INCENTIVE LOAN (TIL)

The TIL Program, formerly the Utah Career Teaching Scholarship, is state-funded. The program waives tuition and fees at the Utah public institutions of higher education, and pays toward tuition costs at BYU and Westminster College, for a period of up to four years. Recipients are required to pursue a teacher education program and to teach in Utah public or private schools for a period equal to the time they receive TIL assistance. If for some reason the recipient does not complete an education program and teach in a Utah public school, they are required to repay all TIL funds received with interest.

EDUCATIONALLY DISADVANTAGED

The Educationally Disadvantaged Program is funded by line item appropriations to the eight USHE institutions. The appropriations are to be used to support the educational needs of students who, because of their social-economic status or demographics, have historically been disadvantaged from pursuing a higher education. Funds may be spent on tuition assistance, counselors, advisors, or tutoring.

Table 5

**Western Interstate Commission for Higher Education (WICHE)
Scholarships Awarded**

		2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Veterinary Medicine	# of Awards	34	28	30	29	28	25	22	17	11	5
	\$ Amount	\$697,200	\$584,200	\$657,500	\$652,800	\$660,350	\$654,750	\$575,050	\$435,000	\$321,300	\$156,500
Optometry	# of Awards	12	12	10	8	7	7	9	12	15	20
	\$ Amount	\$159,600	\$163,200	\$141,000	\$116,800	\$105,700	\$109,200	\$142,200	\$193,200	\$246,000	\$336,000
Podiatry	# of Awards	2	3	4	4	2	4	3	7	10	16
	\$ Amount	\$23,200	\$35,700	\$49,200	\$50,800	\$26,200	\$54,000	\$41,100	\$97,300	\$142,000	\$232,000
Administrative Fee	# of Awards	108,000	112,000	116,000	120,000	124,800	125,000	125,000	131,000	131,000	\$137,000
TOTAL	# of Awards	48	43	44	41	37	36	34	36	36	41
	\$ Amount	\$988,000	\$895,100	\$963,700	\$940,400	\$917,050	\$942,950	\$883,350	\$856,500	\$840,300	\$861,500

**Regional Dental Exchange Program (RDEP)
Scholarships Awarded**

		2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
State Appropriation	# of Awards	40	40	40	40	40	40	40	40	50	50
	\$ Amount	\$ 563,200	\$ 569,700	\$ 589,500	\$ 605,600	\$ 551,000	\$ 503,100	\$ 525,300	\$ 529,600	\$529,600	\$543,000

Notes:

- (1) The Student Exchange Program administered through the Western Interstate Commission for Higher Education (WICHE) and the Regional Dental Education Program (RDEP) assist Utah students in obtaining training in dentistry, veterinary medicine, optometry and podiatry under the interstate compact. Participating students pay resident tuition and general fees of the receiving state or reduced tuition at private institutions. The chart above is a summary of Utah's participation in these programs.
- (2) Beginning in 2012-2013, the State Board of Regents discontinued funding new, first year, veterinary medicine students now that USU has a veterinary medicine program.
- (3) RDEP assists Utah students to obtain training in dentistry through a contract with Creighton University. Participating students begin studying at the University of Utah School of Medicine and then receive reduced tuition at the private institution. Beginning with the 2004 class, students who study at other institutions may receive partial loan forgiveness if they return to Utah to practice.

Table 6

USHE Terrel H. Bell Teaching Incentive Loan (TIL)⁽¹⁾

2004-05 through 2014-15

WAIVERS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2010-11	71	\$145,924	236	\$523,320	122	\$283,594	168	\$364,063	597	319	\$1,316,901
2011-12	122	\$278,014	255	\$612,447	250	\$633,777	44	\$87,933	671	365	\$1,612,171
2012-13	65	\$147,601	293	\$749,490	138	\$346,853	153	\$368,880	649	369	\$1,612,824
2013-14	64	\$146,715	145	\$387,735	370	\$986,388	148	\$360,469	727	411	\$1,881,307
2014-15	127	\$326,316	240	\$617,562	149	\$408,330	172	\$479,862	688	419	\$1,832,070
STIPENDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2010-11	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2011-12	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2012-13	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2013-14	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2014-15	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
PREMIER AWARDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2010-11	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2011-12	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2012-13	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2013-14	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2014-15	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
TOTAL AWARDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2010-11	71	\$145,924	236	\$523,320	122	\$283,594	168	\$364,063	597	319	\$1,316,901
2011-12	122	\$278,014	255	\$612,447	250	\$633,777	44	\$87,933	671	365	\$1,612,171
2012-13	65	\$147,601	293	\$749,490	138	\$346,853	153	\$368,880	649	369	\$1,612,824
2013-14	64	\$146,715	145	\$387,735	370	\$986,388	148	\$360,469	727	411	\$1,881,307
2014-15	\$127	\$326,316	240	\$617,562	149	\$408,330	172	\$479,862	688	419	\$1,832,070
OTHER										Administrative Support Costs	Total Expenditures
2010-11										\$76,072	\$1,392,973
2011-12										\$62,029	\$1,674,200
2012-13										\$61,566	\$1,674,390
2013-14										\$64,091	\$1,945,398
2014-15										\$57,296	\$1,889,366

Notes:

(1) The Terrel H. Bell Teaching Incentive Loan (TIL) is designed to encourage outstanding students to pursue careers as teachers. The program is open to students enrolled in a program of program of study leading to teacher certification in a state-supported college or university, Brigham Young University, or Westminster College.

Table 7

Utah Engineering and Computer Science Scholarship Program (UECSP) FY 2014-15
 Planning Worksheet

Formula

Two times the number of Associate Degrees

Four times the number of Bachelor Degrees

Two times the number of Master Degrees

Five times the number of Doctoral Degrees

Funds are distributed based on the percentage of the whole.

Graduates--2013						
Institution	Associate	Bachelor	Master	Doctoral	Formula	Percent
University of Utah	0	500	225	86	2880	40.89%
Utah State University	3	267	174	19	1517	21.54%
Weber State University	89	222	0	0	1066	15.14%
Southern Utah University	11	33	0	0	154	2.19%
Snow College	33	0	0	0	66	0.94%
Dixie State University	1	28	0	0	114	1.62%
Utah Valley University	92	185	0	0	924	13.12%
Salt Lake Community College	161	0	0	0	322	4.57%
Total	390	1,235	399	105	7043	100%

Scholarship Funds Available for FY 2014-15:	\$38,400
Carry-Over from Previous Years:	\$53,000
Total Available for Allocation:	\$91,400

Institution	Scholarship Share	Amount Disbursed	Students Awarded
University of Utah	\$37,375	\$ 15,000	10
Utah State University	\$19,687	\$ 19,687	14
Weber State University	\$13,834	\$ 8,746	11
Southern Utah University	\$1,999	\$ 2,400	5
Snow College	\$857	\$ 857	1
Dixie State University	\$1,479	\$ 1,479	1
Utah Valley University	\$11,991	\$ 11,991	12
Salt Lake Community College	\$4,179	\$ 5,335	11
Total	\$91,400	\$65,495	65

Table 8

USHE Educationally Disadvantaged Programs

Utilization of Funds for Eligible Purposes				Scholarship Measures			
Expenditure Category	2013-14	2014-15	Budget 2015-16	Measure	2013-14	2014-15	Budget 2015-16
University of Utah				University of Utah			
Scholarships - General	\$155,682	\$163,090	\$172,476	Students receiving general scholarships	204	213	221
Scholarships - Minority Students	80,400	71,600	75,721	Average per student	\$763	\$766	\$780
Tutoring	82,321	72,591	76,768	Minority students receiving scholarships	107	93	97
Counseling	432,449	381,101	403,035	Average per minority student	\$751	\$770	\$781
Total Expenditures	\$750,851	\$688,382	\$728,000				
Utah State University				Utah State University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	0	0	0
Scholarships - Minority Students	85,732	104,490	100,000	Average per student	\$0	\$0	\$0
Tutoring	2,521	7,310	12,000	Minority students receiving scholarships	19	22	20
Counseling	0	0	0	Average per minority student	\$4,512	\$4,750	\$5,000
Total Expenditures	\$88,253	\$111,800	\$112,000				
Weber State University				Weber State University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	n/a	n/a	n/a
Scholarships - Minority Students	0	0	0	Average per student	n/a	n/a	n/a
Tutoring	54,159	22,878	0	Minority students receiving scholarships	n/a	n/a	n/a
Counseling/Other scholarship	301,831	290,390	361,701	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$355,990	\$313,268	\$361,701				
Southern Utah University				Southern Utah University			
Scholarships - General	\$22,861	\$31,643	\$27,250	Students receiving general scholarships	36	40	40
Scholarships - Minority Students	19,500	28,100	24,200	Average per student	\$635	\$791	\$681
Tutoring	0	0	0	Minority students receiving scholarships	26	32	32
Counseling	41,092	40,092	45,650	Average per minority student	\$750	\$878	\$756
Total Expenditures	\$83,453	\$99,835	\$97,100				
Snow College				Snow College			
Scholarships - General	\$32,000	\$32,000	\$32,000	Students receiving general scholarships	106	71	70
Scholarships - Minority Students	0	0	0	Average per student	\$302	\$451	\$457
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling/Other scholarship	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$32,000	\$32,000	\$32,000				
Dixie State University				Dixie State University			
Scholarships - General	\$700	\$4,656	\$0	Students receiving general scholarships	1	4	0
Scholarships - Minority Students	24,800	20,844	25,500	Average per student	\$700	\$1,164	\$0
Tutoring	0	0	0	Minority students receiving scholarships	27	24	25
Counseling	0	0	0	Average per minority student	\$919	\$869	\$1,020
Total Expenditures	\$25,500	\$25,500	\$25,500				
Utah Valley University				Utah Valley University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	n/a	n/a	n/a
Scholarships - Minority Students	0	0	0	Average per student	n/a	n/a	n/a
Tutoring	21,396	21,552	21,878	Minority students receiving scholarships	n/a	n/a	n/a
Counseling	138,344	140,992	144,622	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$159,740	\$162,544	\$166,500				
Salt Lake Community College				Salt Lake Community College			
Scholarships - General	\$135,391	\$110,251	\$178,400	Students receiving general scholarships	161	211	210
Scholarships - Minority Students	0	0	0	Average per student	\$841	\$523	\$850
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$135,391	\$110,251	\$178,400				
Utah System of Higher Education				Utah System of Higher Education			
Scholarships - General	\$440,203	\$341,640	\$510,126	Students receiving general scholarships	508	539	541
Scholarships - Minority Students	\$210,432	\$225,034	\$225,421	Average per student	\$867	\$634	\$943
Tutoring	\$160,396	\$124,331	\$110,646	Minority students receiving scholarships	179	171	174
Counseling/Other scholarship	\$919,620	\$852,575	\$960,008	Average per minority student	\$1,176	\$1,316	\$1,296
Total Expenditures	\$1,730,652	\$1,543,580	\$1,806,201				

VI. STATUTORY TUITION WAIVERS

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Resident Tuition Waivers				
	Resident 10% Meritorious/Impecunious			
UU	\$8,084,752	\$9,083,957	\$9,533,772	\$9,794,787
USU	6,468,498	6,879,542	6,803,868	7,094,309
WSU	4,721,901	5,311,441	5,567,997	6,165,318
SUU	2,633,650	2,764,477	2,837,425	2,887,638
Snow	774,005	878,115	899,840	989,632
DSU	1,512,068	2,043,172	2,015,629	2,086,909
UVU	5,997,010	6,383,524	6,111,436	6,681,297
SLCC	2,068,909	1,845,775	2,007,869	2,007,960
Subtotal	\$32,260,793	\$35,190,003	\$35,777,836	\$37,707,850
	Resident National Guard Waivers Set-aside			
UU	\$137,764	\$124,972	\$153,081	\$163,079
USU	104,808	94,741	109,574	166,843
WSU	65,053	88,840	66,548	126,241
SUU	30,277	68,200	54,684	70,116
Snow	6,300	4,044	6,580	2,998
DSU	7,576	0	9,620	29,388
UVU	82,021	84,501	86,016	143,769
SLCC	6,600	12,416	19,006	21,286
Subtotal	\$440,399	\$477,714	\$505,109	\$723,720
	Critical Occupations			
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0
	Senior Citizens			
UU	\$775,390	\$1,009,174	\$1,135,246	\$1,425,886
USU	0	3,687	6,326	10,874
WSU	113,478	120,767	167,859	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	61,376	54,203	59,315	64,196
UVU	86,193	102,415	110,737	111,888
SLCC	147,351	129,802	124,614	177,620
Subtotal	\$1,183,788	\$1,420,048	\$1,604,098	\$1,790,464

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Police or Firefighter Survivor				
UU	\$0	\$0	\$0	\$0
USU	2,680	1,303	1,376	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	948	5,688
UVU	5,231	5,466	1,176	0
SLCC	2,469	0	1,463	0
Subtotal	\$10,380	\$6,769	\$4,963	\$5,688
Wards of the State				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0
Public School Teachers				
UU	\$172,080	\$13,890	\$133,673	\$52,252
USU	0	0	0	0
WSU	1,013	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$173,093	\$13,890	\$133,673	\$52,252
Sequential Mandarin Chinese				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Purple Heart Waiver				
UU	\$51,665	\$61,734	\$62,304	\$59,086
USU	39,452	51,327	44,093	51,278
WSU	37,384	29,297	26,825	19,552
SUU	10,410	14,674	15,142	13,032
Snow	0	0	0	0
DSU	1,233	6,048	9,120	14,062
UVU	41,175	32,797	28,401	33,599
SLCC	19,080	28,278	20,573	14,196
Subtotal	\$200,399	\$224,155	\$206,458	\$204,805
Scott B. Lundell-Fallen Soldiers' Dependents Waiver				
UU	\$0	\$0	\$3,256	\$0
USU	0	0	4,548	4,639
WSU	0	0	1,943	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	7,724	0	0
UVU	0	1,737	5,970	7,562
SLCC	0	0	0	4,559
Subtotal	\$0	\$9,461	\$15,716	\$16,760
Athletic Waivers- Residents				
UU	\$660,212	\$588,691	\$641,716	\$717,766
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	526,771	568,201	1,117,385	649,277
SLCC	153,915	139,330	132,188	140,820
Subtotal	\$1,340,898	\$1,296,222	\$1,891,289	\$1,507,863
Total Resident Waivers				
UU	\$9,881,863	10,882,418	11,663,049	12,212,856
USU	6,615,438	7,030,600	6,969,785	7,327,943
WSU	4,938,829	5,550,345	5,831,172	6,311,111
SUU	2,674,337	2,847,351	2,907,251	2,970,786
Snow	780,305	882,159	906,420	992,630
DSU	1,582,253	2,111,147	2,094,632	2,200,243
UVU	6,738,401	7,178,641	7,461,121	7,627,392
SLCC	2,398,324	2,155,601	2,305,713	2,366,441
Total Resident	\$35,609,750	\$38,638,262	\$40,139,142	\$42,009,402

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Nonresident Tuition Waivers				
Meritorious Nonresident Undergraduate				
UU	\$795,891	\$4,311,315	\$690,984	\$2,800,294
USU	1,468,943	1,036,257	7,513,221	7,593,534
WSU	1,450,214	1,422,914	2,055,238	2,272,869
SUU	180,450	265,664	1,306,893	1,955,717
Snow	3,780	30,978	213,559	645,498
DSU	192,678	242,575	312,592	336,862
UVU	598,202	572,604	2,477,996	4,082,754
SLCC	52,266	72,749	38,552	22,489
Subtotal	\$4,742,424	\$7,955,056	\$14,609,036	\$19,710,017
Meritorious Nonresident Graduate Waivers				
UU	\$0	\$0	\$0	\$0
USU	2,615,922	2,614,146	2,761,094	3,691,291
WSU	296,905	409,712	476,068	524,251
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$2,912,827	\$3,023,858	\$3,237,162	\$4,215,542
WICHE / WUE				
UU	\$2,621,718	\$1,848,415	\$2,829,641	\$2,989,399
USU	900,584	987,513	960,990	1,155,815
WSU	637,149	673,324	634,256	631,299
SUU	993,385	955,296	1,184,315	2,378,679
Snow	132,692	173,125	91,290	145,260
DSU	580,290	382,095	426,056	704,304
UVU	266,160	353,904	1,564,110	2,293,875
SLCC	129,492	121,018	178,303	181,138
Subtotal	\$6,261,470	\$5,494,690	\$7,868,961	\$10,479,769
Reciprocal Agreements				
UU	\$0	\$0	\$0	\$0
USU	942,811	609,932	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	325,502	251,803	292,584	272,956
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$1,268,313	\$861,735	\$292,584	\$272,956
Border Waivers				
UU	\$109,161	\$67,327	\$45,222	\$53,824
USU	309,096	245,385	19,383	23,178
WSU	15,422	8,097	16,642	8,654
SUU	46,658	49,087	32,173	8,247
Snow	0	0	0	0
DSU	176,637	149,137	124,632	142,728
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$656,974	\$519,033	\$238,052	\$236,631

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Certain Utah High School Graduates- Undocumented				
UU	\$1,507,049	\$748,570	\$824,475	\$907,728
USU	211,355	153,706	183,972	242,078
WSU	265,641	325,731	427,325	468,399
SUU	14,475	11,408	70,736	93,435
Snow	0	0	0	0
DSU	0	0	0	0
UVU	1,190,330	1,269,245	1,226,824	1,406,934
SLCC	1,174,699	664,343	1,640,874	1,750,716
Subtotal	\$4,363,549	\$3,173,003	\$4,374,206	\$4,869,290
Certain Utah High School Graduates-Foreign Nationals				
UU	\$0	\$0	\$440,535	\$487,766
USU	0	60,587	78,734	84,367
WSU	0	39,821	33,454	21,881
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	131,481	124,292	156,907
SLCC	0	8,553	68,896	61,902
Subtotal	\$0	\$240,442	\$745,911	\$812,823
Nonresident Transition Waivers				
UU	\$356,305	\$580,559	\$457,841	\$205,016
USU	2,818,819	2,754,640	391,527	20,514
WSU	22,605	395,632	0	0
SUU	440,924	665,456	518,500	293,798
Snow	0	0	0	0
DSU	1,546,676	1,288,212	1,983,859	2,570,621
UVU	0	0	0	0
SLCC	4,596	0	0	0
Subtotal	\$5,189,925	\$5,684,499	\$3,351,726	\$3,089,949
Athletic Waivers- Non-Residents				
UU	\$0	\$0	\$0	\$0
USU	1,635,960	1,659,377	1,428,300	1,713,091
WSU	930,218	1,085,228	1,226,655	1,283,475
SUU	510,400	684,783	772,723	819,025
Snow	365,579	368,121	431,764	353,105
DSU	161,700	191,487	198,288	205,030
UVU	619,750	570,174	0	641,309
SLCC	184,011	263,986	274,459	240,560
Subtotal	\$4,407,618	\$4,823,156	\$4,332,189	\$5,255,595

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2011-12	2012-13	2013-14	2014-15
Alumni Legacy Scholarship				
UU	\$0	\$0	\$52,500	\$135,000
USU	6,163,611	7,687,429	9,902,082	12,892,845
WSU	308,454	375,513	414,679	333,171
SUU	283,603	305,439	207,792	259,739
Snow	0	0	0	0
DSU	179,472	153,329	228,288	240,936
UVU	12,534	0	0	0
SLCC	0	0	0	0
Subtotal	\$6,947,674	\$8,521,710	\$10,805,342	\$13,861,691
Total Non-Resident Waivers				
UU	\$5,390,124	\$7,556,186	\$5,341,199	\$7,579,027
USU	17,067,101	17,808,972	23,239,304	27,416,713
WSU	3,926,608	4,735,972	5,284,318	5,543,999
SUU	2,469,895	2,937,133	4,093,132	5,808,640
Snow	502,051	572,224	736,613	1,143,863
DSU	3,162,955	2,658,638	3,566,299	4,473,437
UVU	2,686,976	2,897,408	5,393,222	8,581,779
SLCC	1,545,064	1,130,649	2,201,084	2,256,805
Total Non-Resident	\$36,750,774	\$40,297,182	\$49,855,170	\$62,804,263
Total Waivers (Resident and Nonresident)				
UU	\$15,271,987	\$18,438,604	\$17,004,247	\$19,791,883
USU	\$23,682,539	\$24,839,572	\$30,209,088	\$34,744,656
WSU	\$8,865,437	\$10,286,317	\$11,115,490	\$11,855,110
SUU	\$5,144,232	\$5,784,484	\$7,000,383	\$8,779,426
Snow	\$1,282,356	\$1,454,383	\$1,643,033	\$2,136,493
DSU	\$4,745,208	\$4,769,785	\$5,660,931	\$6,673,680
UVU	\$9,425,377	\$10,076,049	\$12,854,343	\$16,209,170
SLCC	\$3,943,388	\$3,286,250	\$4,506,797	\$4,623,246

(1) New waiver beginning 2004-05: Purple Heart Recipient Waiver

New Waiver beginning 2006-07: Scott B. Lundell- Fallen Soldiers' Dependents Waiver

New waiver beginning approx 2009: Alumni Legacy Scholarship Waiver

No waivers were granted for Critical Occupations or Sequential Mandarin Chinese

V. TUITION SET ASIDES FOR NEED-BASED FINANCIAL AID

Table 10

USHE First Tier Tuition Set Aside for Financial Aid

Utilization of Funds for Eligible Purposes			Productivity Measures				
Expenditure Category	2014-15	Budget 2015-16	Measure	2014-15		Budget 2015-16	
				Number	Average Amount	Number	Average Amount
University of Utah			University of Utah				
Need-based Grants	\$1,974,800	\$2,468,000	Students Receiving Need-based Grants	2,692	\$734	3,085	\$800
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	60	\$3,046	100	\$3,200
Other housing stipends	182,787	320,000	Total Receiving Need-based Aid	2,752	\$784	3,185	\$875
Total Expenditures	\$2,157,587	\$2,788,000					
Utah State University			Utah State University				
Need-based Grants	\$276,902	\$278,000	Students Receiving Need-based Grants	109	\$2,540	100	\$2,780
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	362	\$938	369	\$921
Other- Undergrad. Teaching Fellows	339,700	339,700	Total Receiving Need-based Aid	471	\$1,309	469	\$1,317
Total Expenditures	\$616,602	\$617,700					
Weber State University			Weber State University				
Need-based Grants	\$0	\$0	Students Receiving Need-based Grants	0	\$0	0	\$0
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	379	\$1,244	400	\$1,178
Need Based Other	471,299	471,299	Total Receiving Need-based Aid	379	\$1,244	400	\$1,178
Total Expenditures	\$471,299	\$471,299					
Southern Utah University			Southern Utah University				
Need-based Grants	\$276,500	\$276,500	Students Receiving Need-based Grants	79	\$3,500	80	\$3,456
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	-	-	Total Receiving Need-based Aid	79	\$3,500	80	\$3,456
Total Expenditures	\$276,500	\$276,500					
Snow College			Snow College				
Need-based Grants	\$0	\$0	Students Receiving Need-based Grants	0	\$0	0	\$0
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	133	\$3,008	130	\$3,077
Need Based Other	400,000	400,000	Total Receiving Need-based Aid	133	\$3,008	130	\$3,077
Total Expenditures	\$400,000	\$400,000					
Dixie State University			Dixie State University				
Need-based Grants	\$20,025	\$20,025	Students Receiving Need-based Grants	20	\$1,001	19	\$1,054
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	-	-	Total Receiving Need-based Aid	20	\$1,001	19	\$1,054
Total Expenditures	\$20,025	\$20,025					
Utah Valley University			Utah Valley University				
Need-based Grants	\$297,500	\$297,500	Students Receiving Need-based Grants	637	\$467	135	\$2,204
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	-	-	Total Receiving Need-based Aid	637	\$467	135	\$2,204
Total Expenditures	\$297,500	\$297,500					
Salt Lake Community College			Salt Lake Community College				
Need-based Grants	\$213,700	\$213,700	Students Receiving Need-based Grants	257	\$832	250	\$855
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	-	-	Total Receiving Need-based Aid	257	\$832	250	\$855
Total Expenditures	\$213,700	\$213,700					
Utah System of Higher Education			Utah System of Higher Education				
Need-based Grants	\$3,059,427	\$3,553,725	Students Receiving Need-based Grants	3,794	\$937	3,669	\$969
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards/other	934	\$1,639	999	\$1,533
2nd-Tier Tuition Based Scholarships	1,393,786	1,530,999	Total Receiving Need-based Aid	4,728	\$1,075	4,668	\$1,089
Total Expenditures	\$4,453,213	\$5,084,724					

*The U of U, USU, WSU, and Snow provided other types of need based awards. Their respective productivity measures reflect these other rewards.