

The Massachusetts Office of Student Financial Assistance



ACTION LETTER

Action Letter #1
April 2007

2006-2007 PROGRAMS GUIDELINES UPDATES

Dear Colleague:

This Action Letter publishes guidelines for the following three new financial aid programs:

- I. **Math and Science Teachers Scholarship Program** (Effective with award year **2006-2007**)
- II. **Massachusetts Educational Rewards Grant Program** (Effective with award year **2007-2008**)
- III. **Scholar-Internship Match Fund Program** (Effective with award year **2007-2008**)

Throughout the course of the 2007 fiscal year, the Massachusetts Board of Higher Education has been working cooperatively with a number of agencies and entities of the Commonwealth under whose auspices the above three (3) financial aid programs fall. Very recently, funding for these programs was made available to the Board through an interagency transfer process. The Massachusetts Office of Student Financial Assistance has been charged with developing certain delivery systems that can facilitate these programs' implementation.

You will note that the Math and Science Teachers Scholarship Program is being implemented during this current award year 2006-2007, to include availability for summer sessions. **However, the Math and Science Teachers Scholarship funds must be awarded by June 30, 2007. A Math and Science Teachers Scholarship application will be available on OSFA's website by mid April.** Information and material for the Massachusetts Educational Rewards Grant Program and the Scholar-Internship Match Fund Program will be disseminated by OSFA later in the spring.

Please do not hesitate to contact the Massachusetts Office of Student Financial Assistance at 617.727.9420, if you have any questions or need further clarifications.

Massachusetts Office of Student Financial Assistance

I. MATH AND SCIENCE TEACHERS SCHOLARSHIP PROGRAM

BACKGROUND INFORMATION

The **Math and Science Teachers Scholarship Program** was established as a pilot initiative by the Legislature in Fiscal Year 2007. The purpose is to provide financial assistance to Massachusetts teachers who are currently employed in Massachusetts public schools but who have received waivers from certification regulations or are teaching outside their certificate area (“out of field teachers”).

This scholarship is designed to help reduce financial barriers that are often obstacles for educators to take higher education courses or pursue degrees. The program is also an attempt to help address the Commonwealth's current teacher shortage in mathematics and science.

The Board of Higher Education and the Board of Education are charged by the Massachusetts Legislature with developing guidelines and application criteria for the administration of the **Math and Science Teachers Scholarship Program**.

The **Math and Science Teachers Scholarship Program** provides funds to support the tuition, fees and related expenses for eligible educators who successfully complete higher education courses that lead to meeting the Department of Education licensure requirements for teaching mathematics or science.

DEFINITIONS:

ELIGIBLE INSTITUTION:

Any regionally accredited public or private college or university in the Commonwealth of Massachusetts that offers a mathematics or science program of study or program in a related field leading to the Department of Education licensure requirements in mathematics or science.

ELIGIBLE STUDENT:

To be eligible for the Math and Science Teachers Scholarship Program, an applicant must:

- a) be a permanent legal resident of Massachusetts.
- b) be a United States citizen or eligible non-citizen.
- c) be employed, full or part-time, as an educator in a Massachusetts public school or schools that provide publicly-funded special education and currently teaching math and science under a waiver from certification regulations (educator licensure) or currently teaching outside their certification area (out-of-field teachers).
- d) enrolled in up to three higher education courses per academic semester in a degree granting program for math and science teachers, or

- e) pursuing a degree in order to satisfy requirements for teacher certification by the Massachusetts Department of Education for Mathematics or Science
- f) sign an agreement to continue teaching Mathematics or Science in a Massachusetts public school for a term of service after completion of courses or program (no longer teaching out-of-field) or repay funds as defined below
- g) be eligible under Title IV Regulations and not in default of a state or federal education loan or grant
- h) annually file the Free Application for Federal Student Aid (FAFSA)

Priority consideration will be given to applicants meeting the above criteria who are teaching full or part-time in a high-need district. A high need district is a district that has been identified for corrective action in which there are one or more schools identified for corrective action or restructuring; or districts in which the percentage of low-income students is 40% or greater.

Preference will be given to applicants who are identified by superintendents or principals as highly talented educators who have demonstrated a commitment to education and to instructional excellence.

AWARD VALUE:

The award for eligible applicants under this program shall include the cost of tuition, fees, and related expenses as determined by the Board of Higher Education and the Department of Education for up to three eligible courses per academic semester at an eligible institution of higher education in Massachusetts. Eligible applicants may receive a scholarship award for all academic semesters, including summer terms, based on availability.

Priority will be given to teachers employed in high-need districts. Teachers in high-need districts are eligible to receive full funding for tuition, fees, and related expenses. Teachers employed in non-high-need districts are eligible for partial funding (75%) of the cost of tuition, fees, and related expenses.

The Board of Higher Education, in consultation with the Department of Education, will annually review the tuition and fee charges at Massachusetts public and private colleges and universities and adjust the program award values, as it deems necessary.

TEACHING OBLIGATION:

Recipients of the Math and Science Teachers Scholarship Program must sign a Terms and Conditions Statement acknowledging their obligation to provide service as a full-time teacher in a Massachusetts public school (K-12). The service commitment will range from a minimum of one and a maximum of four years of employment as a full-time teacher, depending on the number of courses taken with scholarship assistance, as follows:

1-2 courses	one year
3-4 courses	two years
5-7 courses	three years
8-10 or more	four years

Teachers in high-need districts are expected to fulfill their term of service in a high-need district. If a teacher in a high-need district fulfills the term of service in a non-high-need district, the

teacher must repay the difference between the full scholarship rate and the partial scholarship rate.

A teacher who benefits from the scholarship and fails to provide the required service in a Massachusetts Public School will be responsible for repayment of the scholarship award received, prorated on the length of service provided, as defined in the Terms and Conditions Statement and as determined by the Massachusetts Board of Higher Education, in consultation with the Department of Education.

INSTITUTIONAL DISBURSEMENT OF GRANTS:

Each participating institution must certify that the recipient is eligible in accordance with guidelines established for the Math and Science Teachers Scholarship Program.

All funds appropriated for this program must be expended by June 30 of each fiscal year or as otherwise determined by the Legislature.

PARTICIPATION AGREEMENT:

Each institution participating in the Pilot Scholarship Program for Math and Science Teachers must file a State Financial Aid Program Participation Agreement to be maintained on file in the Massachusetts Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain documentation of a recipient student's eligibility.
- b) The Chancellor shall require each campus to furnish to the Board of Higher Education a report detailing specific information regarding recipients. The Office of Student Financial Assistance will coordinate specification and procedures for this report.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Chancellor, the State Auditor or their authorized representatives, who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, Section 42.

II. EDUCATIONAL REWARDS GRANT PROGRAM FUND

PURPOSE

The purpose of the Educational Rewards Grant Program Fund is to offer financial aid support to dislocated or incumbent workers with very low income to enable them to receive the education they need to transition into jobs in targeted high-demand occupations. The grant program emanates from the economic stimulus bill that is contained in Chapter 123 of the Acts of 2006 (Ch. 29 Sect. 2SSS of the M.G.L.). Such a bill is relative to the economic investments in the Commonwealth to promote job creation, economic growth, competitiveness and overall stability in the Massachusetts economy. This need-based grant program is to serve as a last resort after all other federal and state financial aid sources have been exhausted in meeting postsecondary education enrollment costs. The Educational Rewards Grant Program also allows up to 30 percent of the award amount to be used by the student toward living expenses.

DEFINITIONS:

ELIGIBLE INSTITUTION:

An eligible institution is defined as a public, private, independent, for-profit or non-profit, or vocational technical institution authorized to offer post-secondary certificate or undergraduate degrees. The institution must be accredited and eligible to participate in both Federal Title IV and Massachusetts State financial aid programs.

ELIGIBLE PROGRAM:

A program is eligible if it is an accredited post-secondary certificate or vocational technology program or an associate or bachelor degree program in high-demand occupation fields.

The Board of Higher Education and the Department of Workforce Development, in consultation with the Massachusetts Workforce Board Association, State Workforce Investment Board, Reach Higher Initiative, and the Workforce Accountability Task Force, shall determine the eligible high demand occupations.

ELIGIBLE STUDENT:

Student applicants enrolled in an eligible program must meet the following criteria to be considered for an award under this grant program:

- a) Shall be a dislocated worker or an individual whose income is at or below 200 percent of the federal poverty level or meet other criteria as established by the Department of Workforce Development and the Board of Higher Education, in consultation with the Workforce Accountability Task Force.
- b) Has applied for financial aid using the standard Free Application for Federal Student

Aid (FAFSA) and submit necessary documentation to verify an income at or below 200 percent of the federal poverty level.

- c) Is not in default of any federal or state student loans for attendance at any institution or owe a refund for any previous financial aid received.
- d) Is enrolled in a certificate or degree program and meets the institution's requirements for satisfactory academic progress.
- e) Is a Massachusetts resident domiciled in Massachusetts for at least one year prior to the beginning of the academic year.
- f) Is a U.S. citizen or an eligible non-citizen under Federal Title IV regulations.

STUDENT AWARD:

The award under this program shall be a minimum of \$200 and a maximum of \$3,000 and shall be used to fund tuition, fees and books and may include up to 30 percent of the student's calculated cost of living as determined by the institution or the Board of Higher Education.

The funds from this grant shall serve as a last resort, after other federal, state and institutional aid has been exhausted. To comply with this provision, institutions shall complete and submit to the Massachusetts Office of Student Financial Assistance a detailed financial aid Cost of Attendance and a listing of all financial aid awarded.

Institutions must also report the student's enrollment information as requested.

INSTITUTIONAL DISBURSEMENT OF FUNDS:

Each institution must provide information to the Office of Student Financial Assistance regarding every student's award, credit hours, and financial aid budget plan for the current academic year.

One hundred percent of the funds allocated shall be used for awards for students. Funds that are not disbursed by the institution to the student, for any reason, must be remitted to the Office of Student Financial Assistance as required by the Refund Policy for State financial aid programs.

Education Rewards Grant funds awarded in excess of billed tuition and fees must be disbursed to the student for books and related living expenses, according to program guidelines.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file at the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

It shall be the responsibility of each institution to maintain adequate documentation of a recipient student's eligibility for the Educational Rewards Grant Program.

All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Chancellor, the State Auditor or their authorized

representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, Section 42

III. SCHOLAR-INTERNSHIP MATCH FUND GUIDELINES

PURPOSE:

As part of the 2006 Economic Stimulus legislation (Chapter 123 of the Acts of 2006), the Massachusetts Legislature enacted the Massachusetts Scholar-Internship Match Fund (Chapter 29, Section 2UUU of the M.G.L.). The purpose of the Scholar-Internship Match Fund is to provide a match for industry scholarships and internships given to Massachusetts students going on to study for a post-secondary degree at Massachusetts public higher education institutions. Students shall pursue post-secondary degrees and career paths in specific science, technology, engineering and mathematics (STEM) disciplines that link directly related work experience with their academic program. These disciplines do and will directly support the economic development of the Commonwealth by fulfilling the employment needs of business and industry in high-demand fields. The Massachusetts Scholar-Internship Match Fund creates a framework whereby internship and scholarship funds from business, industry and others sources may be deposited as matching resources to enhance student progress toward degrees in fields vital to the Commonwealth.

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education, as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE PROGRAM:

An undergraduate degree program offered by an eligible institution in high-demand STEM areas, as designated in the Science and Mathematics Access to Retain Talent (SMART) list, exclusive of foreign languages, as developed by the U.S. Department of Education and as amended by the Board of Higher Education.

ELIGIBLE STUDENT:

A Massachusetts high school senior or college student who meets the following criteria:

- a) is a permanent legal resident of the Commonwealth of Massachusetts for at least one year prior to the start of the academic year.
- b) is a U.S. citizen or eligible non-citizen eligible under Federal Title IV Regulations.
- c) is accepted for admission to, or is currently enrolled, full-time in an eligible program, at an eligible institution as defined above.
- d) submits an application for the Massachusetts Scholar-Internship Program, and for approval must:
 1. if a high school senior, have a minimum cumulative GPA of 3.0.

2. if a current college student, meet satisfactory academic progress standards as defined by the institution, and have maintained a cumulative GPA of 3.0 on all college work and meet other eligibility criteria established by the Board of Higher Education.
3. annually file the Free Application for Federal Student Aid (FAFSA).
4. sign an agreement to comply with the internship requirements of the Scholar-Internship Program with a designated Massachusetts employer in a career-related field under the guidance of the Board of Higher Education.
5. complete the minimum number of internships as required.
6. upon the completion of the undergraduate degree program, seek and attain employment in a career-related field in Massachusetts.

MAINTENANCE OF ELIGIBILITY:

It is the responsibility of each recipient of the Scholar-Internship Match Fund Program to maintain his/her continued eligibility for scholarship assistance and/or internship experience while completing the undergraduate degree program. Recipients must demonstrate continued progress in the academic discipline through an annual submission of the college academic transcript, which will be evaluated by the appropriate official. The recipient is responsible for providing the transcript to the proper official at the Board of Higher Education, as designated, in a timely manner to facilitate continued awarding of the scholarship and/or assigned internship.

SCHOLARSHIP AWARD VALUE:

The annual scholarship award to each recipient under this program, which must be matched through the Scholar-Internship Match Fund, shall not exceed \$5,000 per student. The scholarship is contingent upon receiving a corresponding industry scholarship or internship of up to the same amount.

AWARD PROCEDURE:

The Board of Higher Education shall establish a committee to review and select applicants for the Scholar-Internship Match Fund program and to determine the high-need academic disciplines for this program.

Upon the submission and approval of a valid application, the Board of Higher Education will establish the appropriate combination of scholarship and recommended internship program for each student.

All scholarship funds awarded to applicants under this program will be disbursed to the institution for credit to the student's account. However, the student must comply with any internship requirements before scholarship funds may be disbursed.

REPORTS:

The Chancellor of Higher Education shall, no later than July 1, annually report to the House and Senate Committees on Ways and Means, the Joint Committee on Economic Development and

Emerging Technologies, the Joint Committee on Labor and Workforce Development, the Joint Committee on Education and the Joint Committee on Higher Education. The report shall include:

- a) a list of matching scholarship recipients,
- b) the associated match amount,
- c) the amounts of non-state funding as a result of the match,
- d) the purposes of the match,
- e) whether there was an internship associated with the industry match,
- f) an annual statement of cash inflows and outflows detailing the sources and uses of funds,
- g) a forecast of future payments based on current binding obligations, and
- h) a detailed account of the purposes and amount of administrative costs charged to the fund.

The Chancellor shall include in the annual report a detailed five-year legislative review of the Scholar-Internship Match Fund for consideration for recapitalization.

PARTICIPATION AGREEMENTS:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the State Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each college and university to maintain documentation of a recipient student's eligibility for the Scholar-Internship Program.
- b) The Chancellor shall require each campus to furnish annually to the Board of Higher Education a report detailing specific information regarding recipients of the Scholar-Internship Program. The Board of Higher Education will coordinate specification and procedures for this report.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Chancellor, the State Auditor or their authorized representatives, who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, Section 42.

