

Massachusetts Assistance for Student Success Program

XIII. Gilbert Grant

**BOARD OF HIGHER EDUCATION
GILBERT MATCHING SCHOLARSHIP GRANT PROGRAM**

PURPOSE:

The purpose of the Gilbert Matching Scholarship (GMSGP) is to make funds available to participating Massachusetts independent institutions of higher education and schools of nursing. One hundred percent must be used for direct financial assistance to needy Massachusetts undergraduate students to enable such students to attend or continue to attend such institutions.

DEFINITIONS:

ACADEMIC YEAR:

Shall mean the period of time between July 1 of one year and June 30 of the subsequent year.

ACT:

Shall mean the General Appropriation Act for a fiscal year.

COMMISSIONER:

Shall mean the Commissioner of the Department of Higher Education appointed pursuant to M.G.L. c. 15A s.4.

ELIGIBLE INSTITUTION:

Shall mean an institution of higher education in the Commonwealth of Massachusetts which:

- a) admits as regular students only persons having a certificate of graduation from a school providing secondary education or the recognized equivalent of such a certification, and
- b) is legally authorized within the Commonwealth to provide a program of post-secondary education, and
- c) provides an education for which it awards an associate or bachelor's degree and is accredited by the New England Association of Schools and Colleges, or
- d) provides an education which results in an award of a diploma indicating satisfactory completion of a hospital school of professional nursing program which is accredited by the National League of Nursing, and is approved by the State Board of Registration in Nursing
- e) is not a public higher educational institution operated by the Commonwealth or its subdivisions and does not derive the major portion of its annual budget from state or local appropriations, and
- f) does not have as its primary purpose education for religious purposes.

EXPECTED FAMILY CONTRIBUTION:

Shall mean the amount the parent, student and/or the student's spouse are able to contribute to educational expenses as determined by an approved method of need analysis.

FULL-TIME STUDENT:

Shall mean a student who is carrying a full-time academic workload other than by correspondence, measured in terms of:

- a) the tuition and fees customarily charged for full-time study by the institution, or
- b) the course work or other required activities as determined by the institution in which the student is enrolled.

INSTITUTIONAL MONEY:

Shall mean money derived from institutional sources such as endowments, scholarship funds or operating money but not including funds derived from federal grants, loan funds, state scholarship funds or work study and other similar funds.

MASSACHUSETTS STUDENT:

Shall mean a dependent student who is a permanent legal resident of Massachusetts and whose source of support is a parent who has been a permanent resident of the Commonwealth of Massachusetts for the twelve months prior to the opening day of the academic year; or an independent student who has been a permanent resident of the Commonwealth for the twelve months immediately preceding the opening day of the academic year.

NEEDY STUDENT:

Shall mean a student who fulfills all of the requirements of these rules and whose total predicted costs of, and expenses for, attending an institution of higher education are greater than the expected family contribution.

UNDERGRADUATE STUDENT: Shall mean a student who:

- a) is a permanent legal resident of Massachusetts for at least one year prior to the beginning of the academic year and who is a U.S. citizen or a non-citizen eligible under Title IV regulations
- b) is in attendance as a full-time student at an eligible institution; and
- c) a student who has not earned his or her first baccalaureate or professional degree and who is enrolled in a program of study at the postsecondary level which is designed to extend for more than four academic years shall not be considered an undergraduate student for study beyond that fourth academic year and
- d) has not earned his or her first diploma from a hospital of professional nursing program
- e) is not in default of any federal or state student loan for attendance at any institution or owe a refund for any previous financial aid received.

FORMULA FOR ALLOCATION OF FUNDS:

From the sums appropriated in each fiscal year, the Commissioner shall allocate to each participating institution a share of the total GMSGP funds. This share shall be based on a formula that considers the amount of institutional money expended by the institution in the prior academic year, or a three-year average, for scholarship grant aid to needy Massachusetts full-time undergraduate students and the annual appropriation of GMSGP funds. No participating institution shall be allocated more than ten percent of the annual GMSGP allocation, or the amount that is expended from institutional funds in the prior academic year for scholarship aid to needy Massachusetts full-time undergraduate students.

- 1) The Commissioner or his/her designee(s) will review applications for conformity with these Guidelines and determine the amount to be allocated to the participating institutions.
- 2) The Commissioner may require each participating institution receiving an allocation under this program to submit a report prior to April 30 of each fiscal year projecting the portion, if any, of such allocation that will not be used for scholarship aid disbursements for that academic year. Allocations not expended by the participating institutions during the academic year shall be returned to the Board of Higher Education.
- 3) GMSGP funds shall not be allocated or if allocated shall be repaid to the Commonwealth unless disbursed in accordance with these guidelines.
- 4) The Commissioner will notify each participating institution which has filed an application of its grant award no later than ninety (90) days after passage of the Gilbert Matching Scholarship Grant (GMSGP) appropriation, or July 1, whichever is later.

APPLICATION:

- 1) Any eligible institution wishing to obtain a grant under this program shall file an application with the Commissioner annually which shall contain the following information and such information and assurances as the Commissioner shall from time to time require:
 - a) the total amount of actual expenditures made from institutional money for scholarship aid to needy Massachusetts full-time undergraduate students during the previous academic year;
 - b) the number of full-time undergraduate students in the previous academic year, the number of all Massachusetts residents enrolled as Massachusetts full-time undergraduates in the previous academic year, the number of Massachusetts full-time undergraduates receiving scholarship aid from the institutions during the previous academic year;
 - c) an assurance that the institution will continue to be an institution of higher education or school of nursing as defined herein for the next academic year;
 - d) an assurance that the institution will expend an amount equal to one hundred percent of the grant received in scholarship aid to needy Massachusetts full-time undergraduate students;
 - e) an assurance that funds for administration and support of the GMSGP do not

constitute expenditures from the amount allocated for scholarship aid;

- f) an assurance that no portion of the scholarship aid grant shall be used directly or indirectly to reduce the institution's expenditure of institutional funds;
 - g) the criteria and procedures used in determining financial need in selecting GMSGP recipients and in determining the amount of the GMSGP award;
 - h) the name, address, telephone number of the chief operating officer, the financial aid administrator and the person completing the application, and the signature of the person completing the application.
 - i) If an eligible institution does not wish to participate in the GMSGP, the institution shall so state in writing to the Commissioner on a form furnished by the Commissioner
- 2) Applications shall be filed with the Commissioner annually.
 - 3) The Commissioner shall upon request require the applicant to make available for production and inspection by the Commissioner or his designee(s) any documents which support statements made in the application.

INSTITUTIONAL DISBURSEMENT OF GRANT:

- 1) Each participating institution shall spend one hundred percent or a percentage as determined by the legislature, of the GMSGP grant received for scholarship aid to needy Massachusetts students.
- 2) To comply with these Guidelines, the GMSGP scholarships fund shall:
 - a) not be awarded in excess of \$2,500 per academic year for any student; with a minimum award not less than \$200.
 - b) be awarded only in increments of \$100;
 - c) be administered by the institution's existing financial aid or scholarship office;
 - d) be received and disbursed from a separate financial aid account.
- 3) All GMSGP funds must be administered with such fiscal control and accounting procedures as are required herein and as may be required from time to time by the Commissioner.

DETERMINATION OF NEED:

- 1) The institution may use the Federal Methodology to calculate financial need, or any system that produces results consistent with the Federal Methodology.
- 2) No student may be considered to have need unless the total educational expenses are at least \$500 greater than the student's total resources as determined by Federal Methodology
- 3) The total education expense and the total expected family contribution shall be determined in accordance with federal aid standards.

PARTICIPATION AGREEMENT:

All institutions participating in the Gilbert Grant Program must file a State Financial Aid Participating Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- 1) The Commissioner or his designee shall require each participating institution to furnish annually the following information along with any other necessary related information:
 - a) the total amount of GMSGP funds received
 - b) the total amount of GMSGP awards made to students
 - c) the average GMSGP award
- 2) All financial books, records and documents pertaining to this grant shall, at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representative, who shall have access to the premises wherein such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years after receipt of a payment.