

GEAR UP Scholarship

BOARD OF HIGHER EDUCATION

Massachusetts Office of Student Financial Assistance

PURPOSE

The Higher Education Amendments of 1998 launched GEAR UP, a national effort to encourage more young people to have high expectations, stay in school and study hard, and go to college. Through the Board of Higher Education, the Commonwealth of Massachusetts received a GEAR UP State Grant to provide early college awareness activities, improved academic support, information on paying for college, and scholarship. These guidelines establish the terms and criteria for awarding scholarships to GEAR UP participants as required by the United States Department of Education.

DEFINITIONS

- **Eligible Institution:**

An eligible institution is defined as a state-approved public, private, independent, for profit or nonprofit institution in the Commonwealth of Massachusetts authorized to offer undergraduate degrees, certificates or diploma programs and that is also approved by the U.S. Department of Education to administer Title IV programs. Massachusetts state-approved public, private, independent and non-profit institutions located in states that have reciprocity agreements with and approved by the Commonwealth (PA, VT, and the District of Columbia) and award associate and bachelor's degrees are also eligible to participate.

- **Eligible Program:**

An eligible degree or certificate program offered by an eligible institution.

ELIGIBILITY REQUIREMENTS

To be eligible for the GEAR UP Scholarship program, the student must:

- a) be admitted to an eligible institution, as defined;
- b) (1) be a U.S. Citizen, permanent legal resident, or non-citizen eligible under Title IV regulations and physically reside in Massachusetts for at least one year, as of the start of the enrolled term with an intent to remain in Massachusetts consistent with Board of Higher Education policy; or (2) have an approved eligibility status

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designated by the Board of Higher Education pursuant to Section 9 of Chapter 15A, as amended by Section 11 of Chapter 28 of the Acts of 2023;

- c) complete the Free Application for Federal Student Aid (FAFSA) annually
- d) comply with financial aid verification requirements;
- e) not be in default on any federal or state student loans or owe a refund for any previous state financial aid programs;
- f) be fewer than 22 years of age at the time of first scholarship award;
- g) have participated in the Early Intervention component of GEAR UP Massachusetts;
- h) have graduated from a Massachusetts public high school beginning in 2005;
- i) be enrolled full- or part-time in at an eligible institution;
- j) meet satisfactory Academic Progress (SAP) according to institution's requirements and federal standards; and
- k) have not reached the maximum number of semesters of eligibility under the program

AWARD VALUE

- a) The minimum amount of the GEAR UP scholarship for each academic year shall not be less than the minimum Federal Pell Grant as published (Section 401, Federal Regs)
- b) GEAR UP scholarships may consist of awards from one or more state financial aid programs
- c) GEAR UP scholarships shall not be considered for the purpose of awarding other federal grant assistance, except in no case shall the total amount of the student financial assistance awarded to a student exceed such student's total cost of attendance
- d) GEAR UP scholarships may be awarded to eligible students for a maximum of one year or two semesters.

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AWARD PROCEDURE

Beginning with the Class of 2005, the Board of Higher Education will annually identify participating GEAR UP Massachusetts students.

- a) Institutions will be required to certify the attendance of GEAR UP Massachusetts students in each fall and spring and provide information regarding the amount of financial aid awarded to these students from all sources.
- b) GEAR UP scholarship funds are disbursed to the institution in two payments for the fall and spring semesters for students for whom eligibility has been certified by the institution.
- c) Payment of GEAR UP funds is sent directly to the institution from the Commonwealth's Comptroller's Office. One hundred percent of the GEAR UP Scholarship shall be used to credit the student's account.
- d) All refunds shall be sent to the Office of Student Financial Assistance and checks made payable to the Commonwealth of Massachusetts GEAR UP Scholarship Fund

ANNUAL REVIEW

The Department of Higher Education (DHE) is responsible for evaluating the effectiveness of the GEAR UP Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the GEAR UP Scholarship must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the GEAR UP Scholarship.

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- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the GEAR UP Scholarship. OSFA will establish the timeline, specifications, 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 Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records, and documents are 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.