

**Consideration of Year-Round Scholarship Policy Guidelines  
for the 2014-15 Academic Year**

April 2, 2015

**Background**

During the 2013 legislative session, the University of South Carolina (USC) requested consideration of the General Assembly to allow state undergraduate scholarships to be awarded during the summer in order to facilitate time-to-degree for students desiring to earn their degrees on a faster time-table than the traditional academic calendar. USC's request was not acted on during the 2013 session. However, this item was revisited and included in the FY 2014-15 Appropriations Act. The SC Commission on Higher Education (CHE) convened stakeholders from public and independent institutions to participate in discussions regarding how to move forward with summer scholarship award disbursements for the state's three merit based scholarship programs: SC HOPE, LIFE, and Palmetto Fellows.

**Analysis**

CHE staff and the stakeholders on the Year-Round Scholarship Taskforce, met on several occasions to engage in conversations on the current status of the merit based programs and any changes that might be necessitated as a result of providing a summer term award disbursement. The General Assembly approved a provision in the FY2014-15 Appropriations Act to enable Palmetto Fellows and LIFE Scholarship recipients to receive an award during the summer term in addition to being awarded for the fall and spring terms. The proviso was included within the lottery expenditure proviso (3.5) and took effect with the new fiscal year beginning July 1, 2014. The Year-Round Scholarship Taskforce convened four times over the course of the 2013-14 and 2014-15 academic years. Please refer to **Attachment I** for a list of the Year-Round Scholarship Taskforce members.

**FY 2014-15 Proviso Language Excerpted From Proviso 3.5**

*(LEA: FY 2014-15 Lottery Funding): "... A student may receive a Palmetto Fellows or LIFE scholarship award during the summer, in addition to fall and spring semesters of an academic year, provided continued eligibility requirements are met as of the end of the spring semester. Students must enroll full-time, which for purposes of the summer award will require enrollment in at least twelve hours over the course of the summer. The summer is defined as the period between the end of the spring term and prior to the opening of the fall term. The total summer award per student may not exceed half of the allowable academic year award up to the cost of attendance and must be reimbursed if less than twelve hours for academic credit are not completed by the student during summer sessions. If awarded in the summer, a student's total award during his or her enrollment may not exceed the amount that would otherwise be provided under current semester limits applied for the scholarship awards. The Commission on Higher Education may provide additional guidelines necessary to ensure uniform implementation. . . ."*

The draft guidelines were initially provided for review in July 2014 and intended to be effective for program implementation for FY2014-15 with implementation initiated for the 2014 summer term. Subsequently, all parties were able to generate a plausible resolution in respect to implementing a summer scholarship disbursement that would be applicable to all eligible 2-year, 4-year, public, and independent institutions. As such, the Year-Round Scholarship Taskforce was charged with and assisted in fashioning a set of policy guidelines to be disseminated to eligible institutions regarding the awarding and disbursement of scholarship funds for a summer term. The Year-Round Scholarship Taskforce continued discussions with

institutions concerning the guidelines through fall 2014, and the final draft guidelines presented are under consideration for implementation for the summer 2015 term.

Presidents/Chancellors and key institutional personnel were provided a draft of the Year-Round Scholarship Policy Guidelines for review on December 5, 2014. Institutions returned to CHE staff any concerns. All institutional feedback was gathered and compiled into a finalized version of the Year-Round Scholarship Policy Guidelines. Suggestions regarding the Guidelines are included in the final draft being presented to the Committee on Access & Equity and Student Services. **(Attachment II)**

Taskforce deliberations have resulted in the following outcomes effective for the summer 2015 term:

1. Guidelines for determining eligibility specific to a SC HOPE, LIFE, or a Palmetto Fellows Scholarship recipient.
2. Process for institutional scholarship award disbursement and request for invoicing CHE for disbursement.

The attached Policy Guidelines have been developed as a result of discussions, suggestions, and insight from the Year-Round Scholarship Taskforce. The presented Guidelines provide a foundation in which to gauge the progress and feasibility of a summer scholarship disbursement. Because the Year-Round Scholarship program is directed by a temporary one-year budget proviso, considerations for the program in subsequent years will be subject to any statutory or regulatory changes that may occur during the upcoming 2015 Session of the General Assembly or renewal of the budget proviso for FY 2015-16.

### **Recommendation**

The Committee on Access & Equity and Student Services commends favorably to the Commission approval of the proposed Year-Round Scholarship Policy Guidelines for dissemination to eligible institutions.

**Attachment I: Year-Round Scholarship Taskforce Members**

The Presidents and Chancellors of each eligible South Carolina institution were tasked with designating an institutional delegate to serve as a representative of their institution on the Scholarship Taskforce. The following is a list of the institutional designees that have diligently served on the Taskforce since its inception.

<b>Institution</b>	<b>Name</b>	<b>Title</b>
Central Carolina Technical College	Lisa Braken	Vice President of Student Affairs
Central Carolina Technical College	Tiffany Wilson	Director of Financial Aid
Clemson University	Chuck Knepfle	Director of Financial Aid
Coastal Carolina University	Stacie Bowie	Vice President of Finance and Administration
Coastal Carolina University	Greg Thornburg	Vice President for Enrollment Services
College of Charleston	Don Griggs	Director of Financial Aid
Francis Marion University	Peter King	Associate Provost
Lander University	Fred Hardin	Director of Financial Aid
Midlands Technical College	Angela Williams	Director of Financial Aid
Medical University of South Carolina	George Ohlandt	Executive Director of Enrollment
SC Independent Schools and Universities	Mike LeFever	President & CEO
SC Independent Schools and Universities	Eddie Shannon	Executive Vice President
Spartanburg Community College	Nancy Garmroth	Director of Financial Aid*
The Citadel	Mark Bebensee	Associate Provost for Academic Affairs
The Citadel	Hank Fuller	Director of Financial Aid
Tri-County Technical College	Sarah Dowd	Director of Financial Aid*
Trident Technical College	Ellen Green	Director of Financial Aid*
University of South Carolina-Aiken	Kathy Long	Scholarship Program Coordinator
University of South Carolina-Beaufort	Doug Oblander	Vice Chancellor for Student Development
University of South Carolina-Columbia	Dennis Pruitt	Vice President of Student Affairs
University of South Carolina-Columbia	Scott Verzyl	Associate Vice President for Enrollment Management
University of South Carolina-Columbia	Ed Miller	Director of Financial Aid*
Winthrop University	Michelle Hare	Director of Financial Aid
SC Technical College System	Hope Rivers	Vice President for Academic & Student Affairs
SC Technical College System	Russ Bumba	Associate Vice President for Academic and Student Affairs*

*\*Members have since retired or are employed by a new institution. Replacements have been identified for any future Taskforce meetings.*

Attachment II: Year-Round Scholarship PFS and LIFE Policy Guideline 2/03/15

## **Year-Round Scholarships for Palmetto Fellows and LIFE Scholarship Policy Guidelines for FY 2014-15**

### **Background**

During the fall 2013, Governor Haley requested that the Commission on Higher Education (CHE) provide a report to explore the feasibility of opening the state's scholarship programs for awards during the summer. CHE submitted a report prepared in consultation with institutions on the matter at the end of November as requested<sup>1</sup>. The report offered a foundational, working proposal to provide additional flexibility for those students, regardless of institutional affiliation, who are on-track and may be proceeding in their programs full-time throughout the year to do so without being penalized by the absence of scholarship support in the summer.

The Governor supported the program in concept in her Executive Budget proposal for FY 2014-15. The program was in turn supported by both the House and Senate in their budget proposals and included in the final FY 2014-15 Appropriations Act. The implementation of the summer awards for the Palmetto Fellows Scholarship (PFS) and LIFE Scholarship is supported by increased funding for the scholarship programs and a provision in the lottery funding proviso which follows:

*FY 2014-15 Appropriations Act, Part 1B 3.5. (LEA: FY 2014-15 Lottery Funding): ". . . A student may receive a Palmetto Fellows or LIFE scholarship award during the summer, in addition to fall and spring semesters of an academic year, provided continued eligibility requirements are met as of the end of the spring semester. Students must enroll full-time, which for purposes of the summer award will require enrollment in at least twelve hours over the course of the summer. The summer is defined as the period between the end of the spring term and prior to the opening of the fall term. The total summer award per student may not exceed half of the allowable academic year award up to the cost of attendance and must be reimbursed if less than twelve hours for academic credit are not completed by the student during summer sessions. If awarded in the summer, a student's total award during his or her enrollment may not exceed the amount that would otherwise be provided under current semester limits applied for the scholarship awards. The Commission on Higher Education may provide additional guidelines necessary to ensure uniform implementation. . . ."*

This provision allows for State scholarship disbursements for Palmetto Fellows and LIFE for the summer semester, in addition to the fall and spring semester. The inclusion of another

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<sup>1</sup> *Response to Governor's Request of CHE Concerning Summer Scholarship Awards: Assessment of Feasibility and Fiscal Impact of Year-Round Eligibility for Palmetto Fellows and LIFE Scholarships. Report prepared by the SC Commission on Higher Education, 27 November 2013. Accessible at [http://www.che.sc.gov/CHE\\_Docs/infocntr/legisl/2014/2013-11-27\\_CHE\\_ScholarshipYear-RoundEligibility\\_Rpt%20incl6a6b.pdf](http://www.che.sc.gov/CHE_Docs/infocntr/legisl/2014/2013-11-27_CHE_ScholarshipYear-RoundEligibility_Rpt%20incl6a6b.pdf)*

full semester of scholarship support during the academic year for eligible students affords students with greater flexibility while promoting affordability and a faster time to degree.

**Purpose**

South Carolina’s state-funded undergraduate scholarship programs recognize academically talented students who are enrolled at an eligible South Carolina institution. A summer semester scholarship disbursement yields a potential for those eligible students who demonstrate they are on an accelerated track to graduation to earn a degree at a faster pace than on a traditional academic calendar. The availability of summer awards allows for a decreased time-to-degree alternative which in turn assists students in attaining educational goals at lower costs.

The following working guidelines are in place effective July 1, 2014 for FY 2014-15 with implementation initiated for the 2014 and 2015 summer terms. Because the year-round scholarship program is directed by a temporary one-year budget proviso, considerations for the program in the subsequent and future will be subject to any statutory or regulatory changes that may occur during the upcoming 2015 Session of the General Assembly or renewal of the budget proviso for FY 2015-16.

**I. General Requirements for Determination of Summer Award Eligibility**

A. The program for summer awards applies to Palmetto Fellows and LIFE programs. Students earning HOPE may also be eligible following the spring term of the first year.

B. For purposes of the summer awards, summer term is defined as the period between the end of the spring term and prior to the opening of the fall term. The summer term includes all sessions following the end of the spring semester, to include maymester, prior to the start of the succeeding fall term.

C. Pursuant to the provision within FY 2014-15 Appropriations Act Proviso 3.5, the program is implemented as of July 1, 2014. Students enrolled during summer 2014 may be eligible for award provided that the requisite hours have not been completed prior to July 1.

D. A student who has been verified as meeting all general and continued eligibility requirements at the end of the spring semester is eligible to participate in summer scholarship disbursements.

1. Each institution may identify, at their discretion, academic programs/majors/disciplines that present enrollment opportunities that may lead to early graduation so as to advise students with respect to advantages/disadvantages of a summer award.
2. An eligible student may elect not to participate in a summer scholarship disbursement.

E. A student can only receive a summer scholarship disbursement at their home institution. The PFS or LIFE Scholarship recipient must be verified for enrollment at an eligible South Carolina institution.

1. A student who is considered a transient student is not eligible to participate in summer award disbursements.

F. **PFS and LIFE Scholarship Enhancements**: A student who has been determined to have met continued eligibility for the PFS and LIFE Scholarship and has met the scholarship Enhancement eligibility requirement is eligible to receive Enhancement funds for the summer term.

1. A student shall be verified for enrollment in an eligible major after the last day to drop/add a course of the first summer term of their enrollment.

2. A student who is in the first academic year and has met continued eligibility for the PFS the scholarship and has met the Enhancement eligibility requirement at the end of the spring term is eligible to receive Enhancement funds starting the immediate succeeding summer term.
  - a. A student who has not met the Enhancement eligibility requirement at the end of the spring term is still eligible to use the PFS or LIFE Scholarship for the summer term. The summer term still may be used to earn PFS or LIFE Scholarship Enhancement eligibility during the first academic year only.
3. A student does not have the option of deferring Enhancement funds for a summer term if the student opts into the program for receipt of the base PFS or LIFE scholarship.

## **II. Student Scholarship Eligibility Requirements**

A. To participate, a scholarship recipient must meet the following requirements by the end of the spring term in addition to meeting all general scholarship eligibility requirements as set forth by the established program statutes and regulations.

1. **Palmetto Fellows Scholarship:** For participation in summer scholarship disbursement, at the end of the spring semester a PFS recipient must:
  - a. Earn a cumulative 3.0 institutional GPA; and
  - b. Earn at least 30 credit hours of non-remedial coursework during the fall and spring terms, excluding AP, IB, Dual Enrollment, CLEP or exempted credit hours.
  - c. A summer term cannot be scholarship recipient's first term of enrollment.
2. **LIFE Scholarship:** For participation in summer scholarship disbursement, at the end of the spring semester a LIFE Scholarship recipient must:
  - a. Earn a cumulative 3.0 LIFE GPA; and
  - b. Earn an average of at least 30 non-remedial coursework during the fall and spring terms, including AP, IB, Dual Enrollment, CLEP or exempted credit hours.
  - c. A summer term cannot be scholarship recipient's first term of enrollment.
    1. First-time entering freshmen will not be penalized for any credit hours earned during the summer session immediately prior to the student's initial college enrollment. The credit hours earned will not count against the terms of eligibility. The credit hours may be used toward the annual credit hour requirement.
3. A SC HOPE recipient who meets the continued eligibility requirement at the end of the spring semester will be determined to be a LIFE Scholarship recipient. Should the student decide to participate in a summer scholarship disbursement, the student will follow the LIFE Scholarship recipient guidelines.

B. A student must demonstrate having attempted and/or enrolled in a total of at least twelve credit hours over the course of the entire summer term to be awarded.

C. Participating students who are determined to be a Palmetto Fellows Scholarship (PFS) or a LIFE Scholarship recipient and have met the continued eligibility requirements at the end of the spring term are eligible for a fall award regardless of their academic performance over the summer. Continued eligibility for the scholarship will be reviewed at the end of the following spring term.

1. A PFS recipient who does not meet the PFS continued eligibility requirements at the end of spring term who is LIFE Scholarship eligible and elects to receive LIFE Scholarship funds for the summer term is no longer eligible for the PFS moving forward.

D. For participating students enrolled in a two-year institution who have been awarded LIFE in the summer and who have exhausted the maximum allowable terms for LIFE are not eligible to receive the LIFE Scholarship in their fifth term of enrollment at an eligible two-year institution. The maximum allowable terms for LIFE will be in keeping with State Regulation 62-1200.20. Likewise in accordance with State Regulation 62-900.165 students are not eligible to receive Lottery Tuition Assistance within in the same academic year.

### **III. Procedures for Awarding and Disbursement of Summer Funds**

A. The student must be enrolled at an eligible South Carolina institution for the summer term(s).

1. A PFS student must be verified as a full-time enrolled student over the course of the entire summer term at the home institution of the eligible four-year college/university.
2. A LIFE Scholarship recipient must be verified as a full-time enrolled student over the course of the entire summer term at the home institution of an eligible two-year or four-year college/university.
3. Enrollment verification shall be determined no later than the last day to drop/add a course in for the last summer term in which the student is enrolled at the home institution.

B. The institution will identify award amounts. The total summer award amounts per student, to include the PFS Enhancement, may not exceed half of the annual allowable academic year award up to the cost of attendance for the summer term(s).

1. Students must be enrolled and verified as meeting the Enhancement eligibility requirements and be considered in an eligible Enhancement degree program at the start of the summer term.
2. Awards must be reimbursed for those students who have not completed by the end of the summer term at least twelve hours for academic credit. For purposes of this program, completed is defined as attempted hours.

C. Submission of invoices for summer term award disbursements can be made on or before July 31<sup>st</sup>.

1. Invoices and supporting documentation should be submitted for the summer term to the CHE Finance Office. *The CHEMIS scholarship data that is submitted on August 15<sup>th</sup> should match the invoices submitted to the CHE finance office.*
2. Summer term disbursement information will be made available by accessing CHEMIS at the close of the subsequent fall semester.
3. Adjustments to a summer award can be included with subsequent data submissions.

D. The institution must retain a signed Affidavit/Certification Form indicating that the student is not in default of any student loans and has not been convicted of any felonies or any second or subsequent alcohol/drug-related offenses. The Affidavit/Certification form shall be amended to include the following additional certification:

1. The student provides authorization to have their summer scholarship information made available to institutions for determination of continued eligibility.

### **IV. Student Awareness**

- A. Institutions will be responsible for establishing a means of certification from the student that acknowledges the following stipulations:
1. Students awarded summer scholarships shall acknowledge through an established institutional process that acceptance of a summer award disbursement will count against the maximum terms of eligibility and may not lead to early graduation. Participation in summer enrollment opportunities that use scholarship award disbursement(s) for any purpose (academic program, major/minor courses, general education or elective courses,

etc.) will count against the maximum terms of eligibility. Any grades/credit hours will be used to determine continued eligibility.

2. The student has been notified of the continued eligibility requirements for scholarship renewal.