

South Carolina Commission on Higher Education

Brig Gen John L. Finan, USAF (Ret.), Chair
Dr. Bettie Rose Horne, Vice Chair
Ms. Natasha M. Hanna
Ms. Elizabeth Jackson
Dr. Raghu Korrapati
Ms. Leah B. Moody
Vice Admiral Charles Munns, USN (ret.)
Mr. Kim F. Phillips
Mr. Y. W. Scarborough, III
Dr. Jennifer B. Settlemyer
Mr. Hood Temple
The Honorable Lewis R. Vaughn

Dr. Richard C. Sutton
Executive Director

November 27, 2013

The Honorable Nikki R. Haley
Governor
State of South Carolina
1205 Pendleton Street
Columbia, S.C. 29201

Dear Governor Haley:

It is my pleasure on behalf of the S.C. Commission on Higher Education to provide you the enclosed report, as requested in your letter of September 4, that explores the feasibility of opening the state's scholarship programs for awards during the summer.

The goals of the Commission complement your strong interest in finding inventive solutions that will promote greater access to higher education while not sacrificing quality. We share your concern that a primary challenge facing our students and families is the increasing cost of higher education. Creating an environment that promotes accountability and supports innovations in allowing students to earn degrees at a lesser expense is vitally important to our on-going efforts and collective success in becoming a more educated and competitive state.

The University of South Carolina's On Your Time initiative is a great example of just such an approach. The enclosed report offers 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 proposal has been prepared through consultation with institutional representatives and thoughtful consideration of the existing scholarship programs. In this initial proposal, we have endeavored to balance the need for increased student flexibility with the desire to treat all students equitably and preserve the integrity of the state's scholarship programs. We recognize, too, that continuing conversations with the colleges and universities will be necessary to address administrative and procedural concerns. Our staff is working to advance these conversations and will be meeting with institutional representatives by early January.

Again, thank you for the opportunity to explore this proposal more fully. We look forward to working with you and the General Assembly in advancing its implementation.

Sincerely

A handwritten signature in cursive script that reads "John L. Finan".

Gen. John L. Finan
Chairman

JLF/jc

cc: Members, S.C. Commission on Higher Education, and Dr. Richard C. Sutton, Executive Director
Presidents, Chancellors, and Deans, SC Public Colleges and Universities
Dr. James Hudgins, Senior Consultant, State Board for Technical & Comprehensive Education
Mr. Mike LeFever, S.C. Independent Colleges and Universities, Inc.

(Blank page)

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**

Prepared by the SC Commission on Higher Education
27 November 2013

Table of Contents

	<i>Page</i>
OVERVIEW	1
BACKGROUND	1
STATE-SUPPORTED UNDERGRADUATE SCHOLARSHIP AND GRANT PROGRAMS	2
PROPOSED PILOT FOR YEAR-ROUND SCHOLARSHIP ELIGIBILITY	4
Summer Awards, Basic Assumptions and Definition for Summer Award Participants	4
Summer Eligibility and Process	5
Determination of Eligibility for Subsequent Academic Years	6
FISCAL IMPACT	7
ISSUES TO CONSIDER	9
Limitations in program offerings during summer	9
Tracking Eligibility	9
Statutory considerations to enable summer awards	10
ATTACHMENTS	
Attachment 1 , Governor Haley’s request letter	13
Attachment 2 , General Information About Palmetto Fellows, LIFE & HOPE	15
Attachment 3 , Annual Award Provisions – SC Code of Laws.....	16
Attachment 4 , State-Funded Undergraduate Scholarship and Grant Programs	
FY 2013-14 Appropriations.....	17
Awards by Year, Number and Dollars Awarded, FY 2008-09 – FY 2012-13	18
Attachment 5 , Illustration, Cohorts and Awards over the Fiscal Year	19
Attachment 6 , Guide to attached Summary Data on Summer Enrollment and Scholarships	19
Attachment 6a , Excel File, Atta_Enrollment&Schol 2013-11-27	
Attachment 6b , Excel File, Attb_Fiscal Impact Data 2013-11-27	

(Blank page)

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

Prepared by the SC Commission on Higher Education
27 November 2013

Overview

In correspondence dated September 4, 2013, Governor Haley asked the Commission on Higher Education (CHE) to convene the appropriate stakeholders and produce an analysis of the potential enrollment and fiscal impact of a pilot program whereby the state's undergraduate scholarship awards would be allowed during the summer of an academic year. A copy of the Governor's letter is attached (**Attachment 1**).

As requested by the Governor, this paper proposes a process for implementing a statewide pilot for the award of scholarships in the summer, provides an estimated one-time fiscal impact, and outlines issues to be considered.

CHE supports the concept of year-round eligibility (traditional fall and spring semesters and summer) for state-funded scholarships, which contributes to CHE's initiative to expand affordable pathways to a higher education degree. We believe this opportunity should be available to all qualifying students who seek to complete their degrees at a faster pace than the traditional academic calendar and not be limited to those at any particular campus. CHE has determined that this proposed pilot program is feasible, requires a reasonable one-time adjustment in appropriations, and stands to benefit those qualified undergraduate students at all eligible institutions across the state.

We recognize that implementing such a significant change to the state's longstanding merit scholarship programs is not without its challenges. Not all colleges and universities agree that the advantages of providing such an opportunity outweigh potential disadvantages. This proposal focuses on providing an opportunity for those students who are on-track and may be proceeding in their programs full-time throughout the year to do so without being penalized by an absence of scholarship support during the summer. Continuing conversations with the colleges and universities will address administrative and programmatic concerns, as warranted, and as legislative discussions evolve. This working proposal should be viewed broadly as a foundational outline that advances a conceptual framework for consideration of a pilot program.

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. Under current law and regulation, the state's undergraduate merit-based scholarship programs (Palmetto Fellows and LIFE scholarships) are annual awards made to eligible students over the fall and spring semesters of the academic year and in certain limited cases during the summer in substitute for a fall or spring semester.

The proviso requested by USC was not acted on during the session. An alternate proviso that called for a study of this issue was also proposed but not passed. For FY 2014-15, USC has again requested

consideration of a proviso to provide for the use of annual scholarship awards during the summer. The requested proviso, which is the same as that proposed during the 2013 legislative session, follows.

PROVISO: (USC: Lottery Scholarships) Notwithstanding the provisions of Title 59, Chapters 149 and 150 a student may apply his or her scholarship award to three semesters during an academic year. However, the total award per student during his or her enrollment may not exceed the amount he or she would otherwise receive if the scholarship award were applied to no more than ten semesters for a five-year degree program, eight semesters for a four-year degree program, or four semesters for a two-year degree program.

Shortly following the USC request during the 2013 session, CHE at its monthly meeting discussed the awarding of summer scholarships with President Pastides and subsequently convened stakeholders from public and independent institutions to facilitate discussion with institutions to consider the feasibility of providing summer awards and how best to move forward in doing so. The group convened by CHE met twice in the spring and a number of considerations were raised. Also during the session and prior to the convening of institutions, preliminary cost estimates were provided assuming the initiative would be available to all the state's merit scholarship recipients and not just those enrolled at USC. This proposal has evolved from conversations with the institutions collectively and individually. A draft of the proposal was disseminated in mid-November for institutional review and feedback. Institutional comments have been considered by staff and incorporated into the enclosed working proposal. More discussions and opportunity to provide additional comments on this working proposal will occur subsequent to the submission of this report.

The information gathered to date through discussions with institutions, further review of the programs, and initial institutional feedback received on the proposed pilot provides the foundation for the suggested parameters that follow for awarding Palmetto Fellows and LIFE Scholarships during the summer. To the extent possible necessary changes in the current programs are lessened by using the existing framework for the scholarship awards and not creating a new award system. The goal is to outline a process for a statewide pilot for awarding students in the summer that allows greater student flexibility while limiting as much as possible additional institutional administrative burdens. The process suggested strives to maintain the integrity of the programs and treat all students in an equitable manner while providing an additional option for some students.

State-Supported Undergraduate Scholarship and Grant Programs

As briefly described below, the state provides for a number of undergraduate scholarship and grant programs that are available to South Carolina resident undergraduates. These programs are made available to students at the state's public and independent two- and four-year institutions. As described below, each of these programs is funded through a combination of state general funds and education lottery funds. The focus of the proposed year-round eligibility pilot program concerns only Palmetto Fellows and LIFE scholarships and eligible recipients for these programs.

Of the state's scholarship and grant programs, three – Palmetto Fellows, LIFE, and HOPE – are merit-based, requiring students to meet certain academic requirements upon high school graduation and to meet continued academic requirements to maintain the awards during college. The awards are provided on an annual basis with the maximum annual award distributed over the fall and spring semesters to eligible full-time students. There are presently limited exceptions for summer awards for circumstances related to programs such as cooperative work programs, travel study, military mobilizations, and national or international student exchanges that are approved by the institution. For

these programs, a student may not be able to use the award during the fall or spring semesters due to the structure of such programs.

The merit scholarship awards are of limited time-duration to encourage graduation within four-years for undergraduate baccalaureate degrees. Palmetto Fellows and LIFE Scholarships are available over 8 semesters for four-year programs, 10 semesters for defined five-year programs, and 4 semesters for two-year degree programs. HOPE is available only in the first year for students in four-year institutions who are not qualified for Palmetto Fellows or LIFE. Recipients of Palmetto Fellows, LIFE and HOPE Scholarships must be enrolled full-time during fall and spring to receive the awards. The Palmetto Fellows Scholarship is available for eligible students attending eligible four-year institutions, whereas LIFE is available for eligible students attending either two-year or four-year eligible institutions. For Palmetto Fellows and LIFE, students enrolled in four-year institutions and majoring in eligible science, technology, engineering, math and related teaching majors (STEM) may also earn an enhanced award beginning in the second year. The Palmetto Fellows Scholarship program has been in existence since 1988 and LIFE since 1998. Both are funded through a combination of state general funds and lottery funds, and funds must be provided by the state for those meeting requirements. The HOPE Scholarship was initiated in 2002 with the adoption of the S.C. Education Lottery and has been funded predominately through lottery funds. Those meeting HOPE requirements are guaranteed funding through the lottery. See **Attachment 2** for summary details about these scholarships. See **Attachment 3** for provisions in the S.C. Code of Laws related to the annual award requirements.

The other state-supported financial aid programs, which are not considered in this proposal, are grants awarded to students attending two-year institutions and grants awarded based on financial need.

- Lottery Tuition Assistance (LTA) is the grant program that provides funds toward tuition for degree-seeking students enrolled in at least six hours at a two-year institution. LTA grants are made on a semester-by-semester basis and include awards during summer sessions. Students may not be recipients of both LTA and LIFE during an academic year. LTA was initiated in 2002 with the adoption of the S.C. Education Lottery. An appropriation of lottery funds is made each year and award levels are determined based on the available appropriation and estimated participation.
- Need-based grants are available to students in public institutions on an annual basis with awards provided in no more than two semesters during an academic year. Summer award may be substituted for a fall or spring award. Students earning one of the merit-based awards (Palmetto Fellows, LIFE or HOPE) or are LTA recipients may also receive need-based grant awards. Need-based awards for students enrolled full- or part-time at public institutions were first provided in 1996. Program funds are limited to those appropriated annually from the general fund and lottery. Appropriated funds are allocated by formula to institutions for disbursement to students. A percentage of the appropriated need-based funds are directed to students at the state's independent institutions based on their share of state enrollment to supplement the need-based program for students at the independent institutions (i.e., Tuition Grants).
- Tuition Grants are need-based and available to students at independent institutions as annual awards disbursed over fall and spring. The program was initiated in 1970 and is funded by an annual appropriation from general funds and lottery funds with additional funds provided as described from the need-based grant program appropriations.

Attachment 4 includes FY 2013-14 appropriations by source and award trends over five years.

Additional information on the programs is accessible on CHE's website at <http://www.che.sc.gov/Students,FamiliesMilitary/PayingForCollege/WhatFinancialHelpIsAvailable.aspx> .

Proposed Pilot for Year-Round Scholarship Eligibility

Given that the undergraduate merit-based scholarship awards are presently structured for award on an annual basis, a number of considerations with respect to eligibility and continued eligibility are necessary. The following outlines broad parameters for a working proposal for piloting the award of Palmetto Fellows and LIFE scholarships in the summer for those eligible and desiring to continue with their programs full-time in the summer so as to complete their programs on a faster track than the normal academic calendar. The proposal takes into account institutional feedback received in earlier meetings. To limit as much as possible administrative burdens and related costs, the suggested pilot program is in keeping with the present regulatory framework for the merit-based programs to the extent possible but with added flexibility to enable students who are on track to choose to be awarded during the summer in order to facilitate a faster time-to-degree. The piloted summer awards are assumed to be available to all eligible scholarship students across all institutions eligible for participate in the state's merit-scholarship programs.

Summer Awards, Basic Assumptions and Definitions for Summer Award Participants

- Eligibility for Palmetto Fellows and LIFE Scholarships will continue to be considered on an annual basis. However, in order to determine whether or not a student is eligible for summer participation, eligibility will be determined at the end of the spring term. For students meeting continuing grade and hour eligibility, summer awards are available, and whether participating in the summer award or not, summer will not be used in determining eligibility for the fall of the next academic year as outlined below. It is suggested eligibility for fall be based on eligibility as of the end of spring for those students meeting eligibility requirements at the end of spring. The purpose is to lessen administrative burdens that would result in determining eligibility on a semester-by-semester basis for those students participating in summer awards.
- For students not meeting continuing eligibility grade and hour requirements, summer awards are not available and summer will continue to be available to these students for purposes of credit recovery and regaining eligibility in the next academic year.
- Consistent with the current programs, Academic Year is defined to include fall semester of one calendar year, spring semester of the next calendar year, and the summer sessions following the spring term. As is currently the case for Palmetto Fellows and LIFE Scholarship recipients, participation in the summer will require students to be enrolled full-time. Consideration for defining summer, which often consists of multiple sessions, and what constitutes full-time enrollment as a result must be addressed.
- For purposes of summer awards only for participating students, summer includes all sessions between the end of the spring session and the beginning of the next academic year in the fall.
- Students participating in summer awards will not earn the Palmetto Fellows or LIFE Scholarship for more than current number of allowable semesters.
- All eligibility requirements in addition to the academic (i.e., GPA and hours) requirements must be met to continue the award.
- Students may not be awarded in the summer prior to the initial fall enrollment. Students who enroll for the first time in mid-term (i.e. spring) may be eligible for participation. Students who

have received LTA during an academic year and graduate from a program are presently not eligible to receive a LIFE Scholarship within the same academic year even if they have remaining terms of eligibility. Additional consideration and regulatory change would be needed to allow participation for students in this circumstance.

- The current appeals process will remain in effect.

Summer Eligibility and Process

- Each spring, students who are receiving Palmetto Fellows, LIFE, or HOPE Scholarships must identify to the institution whether or not they would like to be awarded in the subsequent summer.
- Eligibility for all students will be determined at the end of the spring term of the academic year with determination made for those identifying they want to be awarded in the summer considered first.
- Those students who received HOPE or who become eligible for LIFE after the initial fall and spring semester may participate in summer awards. Transfers-in during the summer may also participate if eligibility requirements are met prior to enrolling in summer. For study abroad/away, internships, or other such unique circumstances, student may be eligible to participate, but as is currently the case a determination for eligibility and subsequent award will be made upon receipt of official transcripts.
- Enhancement awards for Palmetto Fellows and LIFE STEM majors and any increase in the number of Palmetto Fellows after the first academic year will be considered after the initial fall and spring enrollment for those eligible to be awarded in the summer. As is the case currently, students must be eligible for the base award in order to receive the enhanced awards, and the base award and enhancement award are made together. Summer may be used by participating first-year students to take the requisite fourteen hours needed in math and science to become eligible for the awards. For those students participating in the summer awards after the third semester but who have not yet met the fourteen hours required, the STEM award may not be awarded until the close of summer or upon completion of the fourteen hour requirement during the summer provided the student has declared an eligible major.
- **Students who do not meet continued academic eligibility based on grades and hours at the end of spring are NOT eligible for summer awards.** Students who do not have the requisite grade point average and hours for continued eligibility may not participate in the summer awards. As is the case currently, these students who are not eligible for summer participation may use summer for credit recovery and regaining eligibility in the fall. Eligibility for the next academic year will be determined at the end of that academic year as is currently the case.
- **Students who meet continued academic eligibility based on grades and hours at the end of spring ARE eligible for summer awards.** Assuming all other requirements in addition to academic eligibility continue to be met, students who have the requisite grade point and hours for continued eligibility may elect to use the award in the summer provided all other eligibility requirements continue to be met. Eligible students enrolling for the first time in mid-term may participate if the grade point average and 15 hours are met at the end of spring term.

-
- a. For those identifying that the summer award is desired:
- i. It is suggested that consistent with the current award structure and students should be encouraged to take at least 15 credit hours during the summer sessions at the home institution. At a minimum, students must be considered full-time. Because it is suggested that summer be defined as inclusive of all sessions, it is proposed that full-time be defined as taking at least twelve credit hours over the course of the summer.
 - ii. Once enrolled in the summer and the scholarship is granted, one semester will be deducted from eligibility. However, it is suggested that a grace period be determined after the initial enrollment in summer to provide students an opportunity to opt-out of summer awards.
 - iii. If by the end of the institution's summer sessions, a student does not complete at least 12 hours, the student will be considered to have dropped to part-time status. Consistent with students who drop to part-time during the fall and spring, the award will be forfeited. Unlike fall and spring in which scholarships are refunded to the state based on the institutional reimbursement policies, considering full-time over the course of the summer rather than in a single session warrants consideration for appropriate reimbursement should the student not be considered full-time. It is suggested that if twelve hours are not attempted during the summer, the student will be considered to have dropped to part-time for purposes of the scholarships and must reimburse the institution if at least twelve hours are not completed. Further discussion is necessary given implications and concerns voiced by institutions in considering the appropriate balance for those participating and not remaining full-time as defined for purposes of the summer awards.
 - iv. The scholarship award level will be no more than half of the maximum allowable annual award and may not exceed the student's summer cost of attendance. Half of the maximum award is as follows for each program:
 1. For Palmetto Fellows, up to \$3,750 after the initial year or the first fall and spring semesters.
 2. For Palmetto Fellows with the STEM Enhancement after the initial year, up to \$5,000.
 3. For LIFE, up to \$2,500 including the \$150 book allowance. (For technical colleges for which tuition and fees per semester do not exceed the maximum semester LIFE award, the maximum semester award may not exceed the resident out-of-district tuition and fees plus \$150 book allowance.)
 4. For LIFE with the STEM Enhancement after the initial year (fall and spring semesters), up to \$3,750.

Determination of Eligibility for Subsequent Academic Years

- Students who are determined eligible for continued awards as of the end of spring will be eligible for the fall award based on the spring determination and provided all other eligibility requirements (i.e., those not relating to grades and hours such as residency) continue to be met as of the fall.

-
- Whether or not the award is used in the summer by those eligible for summer participation, summer grades/hours will be included in determining a student's GPA as required under Palmetto Fellows and LIFE for purposes of determining continuing eligibility at the end of the next spring term.
 - For those eligible at the end of spring but declining the award in the summer, eligibility for the subsequent academic year will be based on determination as of the end of spring and any enrollment in summer sessions will not be used in re-considering the eligibility for the upcoming academic year.
 - There is not a change to the requirement that students must complete 30 hours by the end of the each academic year as currently required for Palmetto Fellows or LIFE. It is noted that summer is considered part of an academic year whether or not a student participates in the summer awards. (See **Attachment 2** for information on these requirements.)

Fiscal Impact

Palmetto Fellows and LIFE Scholarships, including the associated enhanced awards for STEM majors, are open-ended awards. The General Assembly has provided in law that the awards must be made to all students meeting requirements. Annually, the General Assembly has met this obligation and has included full-funding in the budget each year that takes into account anticipated program participation and growth.

As outlined, the purpose of the summer award is to provide students with an opportunity to expedite time-to-degree and earn the scholarship awards in a term during the academic year not currently available to them in doing so. Presently, the allowable annual award for Palmetto Fellows or LIFE Scholarships is spread over two semesters (fall and spring) with limited exception where summer may be substituted for a fall or spring semester award. In no case does an individual student receive more than the maximum allowable annual amount annually in an academic year. As conceptualized, adding the possibility of summer awards in keeping with fall and spring award provisions will enable a student to be provided the award in each of three sessions (fall, spring, and summer) within one academic year. In the proposed pilot, the annual award is not spread over these three sessions. Rather, eligible students are afforded the opportunity if full-time as is required statutorily for fall and spring and on-track for a full semester award during the summer.

Consequently, an additional appropriation for the fiscal year in which summer award is initiated would be required initially to account for adding summer during the academic year award cycle. There would be no increased award amount over the life of the program for an individual student as each student would continue to be limited to the same number of semesters of eligibility. Once additional funds have been incorporated initially to account for summer awards in the fiscal year appropriations, estimates thereafter would factor in summer along with fall and spring in considering anticipated participation and funding needs. However, if providing the opportunity for summer awards incentivizes greater numbers of students to enroll in summer in order to complete their degree programs on a faster track, an additional adjustment to account for such a future surge in summer participation may be necessary.

*See **Attachment 5** for an outline of the current program for cohorts over time and a scenario for cohorts whereby summer is made available for awards.*

CHE collects data from each institution on disbursement of Palmetto Fellows and LIFE awards. Data on summer enrollment is collected by CHE for public institutions. To provide a fiscal impact CHE has used available data for the most recent three years of scholarship disbursements and summer enrollment data (2011, 2012, and 2013). A methodology similar to that used in developing an initial impact for consideration of summer awards that was submitted during the 2013 session is used. Data were reviewed and estimates calculated using three methodologies.

First, because summer and spring enrollment data are available only for public institutions, an estimate was calculated using information based on spring scholarship recipients and subsequent summer enrollment. An estimate was determined that considered participation in each year for those who subsequently enrolled in summer and attempted at least 12 hours. For the public institutions, the estimated total for Palmetto Fellows and LIFE summer awards is \$1.9 million in 2011, \$1.7 million in 2012 and \$1.6 million in 2013. The three-year average is \$1.7 million.

Second, in order to include all institutions, public and independent, an estimate was considered relying on data on summer enrollment for the public institutions and applying an estimated summer participation percentage to annual disbursement data for Palmetto Fellows, LIFE and HOPE award data. Using 1.5%, 2%, and 3% participation, the estimated impact for all institutions averaged over three years ranged from \$1.7 million to \$2.3 million to \$3.4 million.

Third, an alternate method was applied to the annual award disbursement data for all institutions. This method reviews whether consideration of data known concerning fall to fall scholarship retention might affect the calculated impact. Under this method, the percentages for scholarship retention were applied to the annual disbursement data to determine an eligible participation number. A percentage based on the public spring/summer recipient participation was then applied to determine the estimated summer participants and cost. The estimated totals for Palmetto Fellows and LIFE summer awards for all institutions using this method were \$2.2 million in 2011, \$2.0 million in 2012 and \$1.4 million in 2013. The three-year average is \$1.9 million.

*See **Attachment 6** for a description of the information included in excel files (Attachments 6a and 6b) that are provided with this document. **Attachment 6a** includes summary enrollment data.*

***Attachment 6b** includes fiscal impact calculations and summaries.*

Based on the data reviewed, it appears that a reasonable estimate of the initial additional cash layout for the fiscal year in which the program is implemented (e.g., FY 2014-15 which includes fall 2014, spring 2015 and summer 2015) may range from approximately \$1.7 million to \$3.4 million based on data averaged over three years. If implementation in FY 2014-15 but the program is allowed to begin in summer 2014 (part of the prior fiscal year), the fiscal impact would need to include consideration of two summers (i.e., summer 2014 from the prior fiscal year and summer 2015 in FY 2014-15). It would be expected that participation in summer 2014 would be much lower than might be anticipate in summer 2015 since the timing of the passage of any legislation during 2014 and academic schedules for summer registration would not afford much if any time for student planning. Following implementation, participation may be expected to grow after the initial year if students are encouraged to enroll and complete programs on a faster track.

The estimated costs address only the estimated costs for student awards. Other costs may be incurred by institutions and CHE with respect to program administration. Because financial aid offices are usually not staffed at full capacity during a summer and summer processing is more of a manually-driven process in packaging student aid, it would be anticipated that as the changes are made to implement summer awards there may be additional operating costs due to increased workload on financial aid

offices. The impact would vary by institution based on the level of student participation. The proposed method for initiating a pilot of summer awards attempts to limit administrative burdens that were discussed with institutions in earlier meetings to the greatest extent possible. Most significantly, the suggested implementation maintains the annual award process and does not create the need for a separate dual tracking system as would be the case if awards were considered each semester and the definition of an annual award was changed for students choosing to participate in the summer. However, as addressed below, there are concerns with the tracking of students enhanced by the summer pilot that will also result in additional administrative burdens.

Issues to Consider

Changing the current programs will increase student flexibility. However, there are issues that should be noted in the event that summer awards are implemented.

Limitations in Program Offerings During Summer

The full array of academic program offerings is typically not available to students during the summer. Consequently, while a student may be eligible to participate in the summer, needed courses to stay on track with a degree program may not be available during the summer. Careful planning by students and with advisors is necessary to ensure that enrollment in the summer does not have the unintended consequence of a student exhausting available state aid prior to meeting degree requirements.

Cost considerations of summer enrollment and challenges for students of financial need:

Unless a student receiving federal Pell Grants has not used the full amount allowable in the year, Pell Grant awards are not provided in the summer. Other institutional and private scholarship and grants are also not typically available or are limited during the summer. State need-based grants have been made available in the summer for those students who were not awarded in both the fall and spring semesters pending the availability of funds at an institution by summer. Given these limitations in available financial aid grants, enrolling in summer may result in higher out-of-pocket costs for students and limit greatly the extent to which students of limited means and with financial need could participate. Further, some institutions noted that tuition costs and room and board costs may fluctuate and be higher during the summer as compared to the traditional academic year when institutions are operating at full capacity. Students may, therefore, incur greater program costs during the summer even with the availability of state-supported awards. Therefore, the lack of availability of other financial aid resources in the summer and potential higher costs, students may incur greater out-of-pocket costs in the summer which may in turn require students to take on greater loan indebtedness.

Tracking Eligibility

As alluded above in describing potential costs beyond student awards, concern has been expressed with regard to tracking scholarship students and terms of eligibility, particularly with tracking students across institutions, such as is the case with transfer students. If summer awards are implemented, there is a greater necessity created for tracking the number of terms of eligibility for all students who have been awarded. Award is based on a student's initial enrollment and a certain number of fall and spring semesters from that date through the allotted timeframe. As a result, institutions are able presently to determine the number of remaining terms of eligibility by knowing when a student enrolled for the first time. With summer awards, it would no longer be possible to use such logic as some students will have used eligibility during one or more summers. Consequently, there would be anticipated administrative

costs associated with the need to begin to track the terms of eligibility. The proposal attempts to limit some of this burden by maintaining an annual award process.

Currently, there is not a central, state-mandated tracking database for scholarship students. Institutions administer LIFE at the campus level and CHE in cooperation with the institutions administers Palmetto Fellows. Data are collected centrally on enrollment and scholarship disbursements but unit-record student-level transcript data are not collected centrally. To create a tracking system would be a costly under-taking and would take time to develop and implement. CHE does not have an estimated cost for implementing such a system and has assumed that a mandated-tracking system, while suggested by institutions, is not on the near horizon. CHE will work with institutions on an administrative solution to best address the administrative concerns if the summer awards move forward.

Statutory Considerations to Enable Summer Awards

- Palmetto Fellows: Permanent State Code suggests the award amount is an annual amount. The limit of the base award is \$6,700. For the enhanced award which is available in the second year, the additional amount is limited to \$3,300 annually (an increase of \$800 for all Palmetto Fellows and \$2500 for STEM) for no more than three years where annual is defined as thirty credit hours each year. Regulation provides for the process by which the annual award is disbursed each academic year over fall and spring semesters. **(Attachment 3)**
- LIFE: Permanent State Code prohibits the award from exceeding the current maximum limits within a year. Regulation provides for the maximum annual award to be distributed over the fall and spring of the academic year. **(Attachment 3)**
- Budget Proviso proposed by USC: If implementation of summer awards is made permissible initially through a budget proviso, clarification is needed to address the following:
 - Make clear which scholarship programs are included. The assumption is that both Palmetto Fellows and LIFE are the scholarships included. However, the Palmetto Fellows Scholarship is not included in the statutory provisions listed in the proviso. S.C. Code Section 150 refers to the S.C. Education Lottery section which includes provisions for Lottery Tuition Assistance (LTA) for two-year institutions and HOPE. Palmetto Fellows and LIFE Scholarships both pre-dated the lottery and are established in separate sections of the State Code (59-104 and 59-149, respectively).
 - Summer awards should be made available statewide to all eligible students attending eligible institutions and not those only attending USC.
 - Implementation date – The change has been proposed by USC to be accomplished through a temporary budget proviso. While a proviso has the advantage of enabling the initiative to be piloted prior to permanent law change, the proviso as drafted needs clarification with respect to implementation and also concerning the intended launch date if the change is supported. A budget proviso would become effective for the fiscal year beginning July 1 which is after the start of the upcoming summer 2014 sessions for the colleges and universities. Given the timing of the effective date and likelihood of not knowing whether such a change would be included in the budget until late in the session, it might be assumed that the pilot could not be implemented until summer 2015. Institutional feedback has suggested that the pilot would be best implemented in summer 2015 to provide time to prepare for necessary administrative changes and importantly to provide sufficient time for student planning and appropriate advising and information dissemination to students. If the intention is the upcoming summer,

additional consideration as to legislative direction would be needed and in order to begin in Summer 2014, funding in FY 2014-15 would have to take into account both an increased need to cover retroactively any summer 2014 increases due to participation and also the following summer 2015 that would be encompassed in the fiscal year.

- The proposed USC proviso with suggested mark-up to address the concerns and to clarify parameters for the awards follows:

PROVISO: (~~USC: Lottery~~ ~~CHE: Palmetto Fellows and LIFE Scholarships~~) Notwithstanding the provisions of Title 59, Chapters 104 and 149 and 150 a student may ~~apply~~ also **be awarded** his or her **Palmetto Fellows or LIFE** scholarship award ~~to three semesters 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 which is defined as the period between the end of spring term and prior to the opening of 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.** ~~However, the~~ **If awarded in the summer, a student's** ~~the total award per student during his or her enrollment may not exceed the amount he or she would otherwise receive under current semester limits applied for the scholarship awards of no more than ten semesters for a five-year degree program, eight semesters for a four-year degree program, or four semesters for a two-year degree program.~~ **The Commission on Higher Education may provide additional guidelines necessary to ensure uniform implementation.**

(Blank page)

SEP - 4 2013



State of South Carolina Office of the Governor

NIKKI R. HALEY
GOVERNOR

1205 PENDLETON STREET
COLUMBIA 29201

September 4, 2013

Brigadier General John L. Finan (Ret.)
Chairman
South Carolina Commission on Higher Education
1122 Lady Street, Suite 300
Columbia, South Carolina 29201

Dear Chairman Finan,

Our ongoing efforts to improve South Carolina's higher education system constantly force us to balance competing priorities. How can we expand access to the college experience without lowering our standards? How can we provide students with the world-class faculties, equipment, and experiences they deserve, while still controlling costs? How do we ensure that graduates will have the skills they need to find enriching and fulfilling jobs in the competitive, globalized economy of the 21st century?

I struggled with these questions as I worked with various stakeholders, including the presidents of our public colleges and universities, to develop my Accountability-Based Funding model (ABF), on which the General Assembly continues to deliberate. Like others, I am concerned with the rising cost of higher education, but unlike many of them, I don't believe the solution lies either in political grandstanding or in an endless series of bureaucratic approvals and re-approvals of even the most trivial institutional actions.

Our colleges and universities will have to adapt to rising healthcare and construction costs by changing the way they do business; similarly, we at the state level have an obligation to respond to these forces by creating an environment in which our institutions have the ability to tailor their offerings and methods of delivering a quality education to meet the needs of today's students.

Last year, the University of South Carolina took this message to heart by proposing a pilot project called "On Your Time." This plan called for the creation of a true third semester during the summer, which would help students graduate more quickly and would also enable the state to make the most of its investments in academic facilities. By allowing our students to benefit from this infrastructure year-round, we can empower them to graduate as much as a year earlier. The

prospective savings for South Carolina's families and taxpayers are real, not just in terms of tuition, but also room, board, and other living expenses.

As proposed, "On Your Time" would retain the eight-semester limit on lottery-funded scholarships, but would now permit a student to receive three semesters of support during a single year. This would have a significant one-time impact on lottery funds as students begin to draw support for the summer semester, but the effects would "smooth out" over time as students on the accelerated completion track exhaust their eligibility and graduate.

Several drafts of the FY 2013-14 budget would have directed the Commission to further investigate this proposal and to report back with an analysis of how such an initiative would have been received by students and other institutions; I was disappointed that this proviso never left the conference table.

I believe this proposal has merit and is worthy of more diligent review. Therefore, I am asking the Commission to convene the appropriate stakeholders and produce an analysis of the potential enrollment and fiscal impacts of a broader pilot program. Please ensure that the work is completed by December 1, 2013 so that your findings can inform not only the FY 2014-15 Executive Budget, but also the subsequent legislative deliberations on next year's spending plan.

Thanks to you and your fellow commissioners for your continued service to South Carolina. God bless.

My very best,



Nikki R. Haley

NRH/cs

General Information about the Undergraduate Merit-Based Awards

	Palmetto Fellows	LIFE	HOPE
Statutory Provisions Law	59-104-20 and 59-104-25	59-149-10– 59-149-160	59-150-370
Regulation Appeals	R. 62-300 – 375 R. 62-1000 –1040	R. 62-1200.1-1200.75 R. 62-1000 –1040	R. 62-900.85 – 900.140
Eligible SC Resident Students and Institutions	Available for SC resident students who meet certain eligibility requirements upon high school graduation and enroll in eligible 4-year public and independent institutions. Students must be enrolled full-time. Awards are made through an application process administered by CHE.	Available for students in eligible 4-year public and independent institutions and 2-year institutions. Students must be awarded full-time. Awards are made by institutions.	Available for students in eligible 4-year public and independent institutions. Students must be awarded full-time. Awards are made by institutions.
Maximum Award Values	AY1: \$6,700 AY2-4: \$7,500 Base and \$2,500 additional for eligible STEM Majors Award may not exceed Cost of Attendance	AY1: \$5,000 * AY2: \$5,000 Base and \$2,500 additional for eligible STEM Majors* Award may not exceed Cost of Attendance. For 2-year colleges, award may not exceed full-time tuition and required fees plus book allowance or maximum award amount including book allowance. *Award amounts are inclusive of annual \$300 book allowance.	AY1: \$2,800 AY2-4: Not applicable. HOPE is limited to a one-year award. Students may subsequently qualify for LIFE. Award may not exceed Cost of Attendance
Renewable	Annual Award and renewable if meet continuing eligibility at end of AY. Once lost, may not be regained but may become eligible for LIFE.	Annual Award and renewable if meet continuing eligibility at end of AY. Once lost, may be regained after one academic year.	N/A, award is not available after the first academic year including fall and spring.
Continuing Eligibility: Cumulative Hours	30 hours each academic year. Hours prior to high school are not included. Cannot use AP, IB, CLEP, Dual Enrollment or exempted credit hours to meet requisite credit hour renewal	Average of 30 hours each academic year. Students may use may apply hours earned prior to college enrollment including AP, IB, Dual Enrollment or exempted credit hours in meeting the credit hour renewal	N/A: Award available only in AY1 which is awarded over the fall and spring semesters.
Cumulative GPA	3.0 College (Institutional) GPA at end of Academic Year Only grades earned at the home institution will be included in the CPA calculation for renewal requirements	3.0 LIFE GPA at end of Academic Year. LIFE GPA is inclusive of all college hours attempted.	

Additional information is accessible on CHE's website at

<http://www.che.sc.gov/Students,FamiliesMilitary/PayingForCollege/WhatFinancialHelpsAvailable/ScholarshipsGrantsforSCResidents.aspx>.

Annual Award Provisions – SC Code of Laws

Emphasis added to highlight current annual requirement in law. For full text, see [Palmetto Fellows](#) and [LIFE](#). Program Regulations are available <http://www.scstatehouse.gov/coderegs/c062.php> (Palmetto Fellows R.62.300-375 and LIFE R.1200.1 – 1200.75).

Palmetto Fellows:

SECTION 59-104-20

...Each Palmetto Fellow shall receive a scholarship in an amount not to exceed six thousand seven hundred dollars. These scholarships in combination with all other grants and scholarships shall not exceed the cost of attendance at the institution attended. The commission shall promulgate regulations and establish procedures to administer the program and request annual state appropriations for the program....

SECTION 59-104-25, Additional Palmetto Fellows Scholarship stipend.

(A) A resident student who is at least a sophomore attending a four-year public or private institution of higher learning in this State, who is majoring in science or mathematics as defined below, and who is receiving a Palmetto Fellows Scholarship for the current year, shall receive an additional Palmetto Fellows Scholarship stipend equal to the cost of attendance after applying all other scholarships or grants, not to exceed three thousand three hundred dollars each year for no more than three additional years of instruction, including his sophomore year, if the student enrolled in a four-year degree program, or for not more than four additional years of instruction, including his sophomore year, if enrolled in a five-year degree program or a 3 plus 2 program. A year is defined as thirty credit hours of instruction or its equivalent each year. To receive the additional Palmetto Fellows Scholarship stipend each year, the student must receive the underlying Palmetto Fellows Scholarship for that year and must be making acceptable progress each year toward receiving a degree in his science or mathematics major. . . .

LIFE

SECTION 59-149-10

...(E)(1) Beginning with school year 2002-2003, the annual amount of a LIFE Scholarship for eligible resident students attending a four-year public or independent institution as defined in this chapter is increased to the cost of tuition for thirty credit hours a year or its equivalent plus a three hundred dollar a year book allowance. Tuition for this purpose means the amount charged for registering for credit hours of instruction and shall not include other fees, charges, or costs of textbooks, except for the referenced three hundred dollar book allowance, and may not exceed four thousand seven hundred dollars for each student for each year, plus the book allowance. (2) In addition, and notwithstanding the provisions of subsection (D) above, beginning with school year 2002-2003, eligible resident students attending two-year independent institutions may not receive an annual LIFE scholarship of more than the maximum cost of tuition at two-year regional public institutions for thirty credit hours a year or its equivalent. An eligible student attending a two-year public or independent institution or technical college shall receive the three hundred dollar book allowance in addition to his cost of tuition. ...

SECTION 59-149-15. Additional LIFE Scholarship stipend.

(A) A resident student who is at least a sophomore attending a four-year public or private institution of higher learning in this State, who is majoring in science or mathematics as defined below, and who is receiving a LIFE Scholarship for the current year, shall receive an additional LIFE Scholarship stipend equal to the cost of attendance after applying all other scholarships or grants, not to exceed two thousand five hundred dollars each year for no more than three additional years of instruction, including his sophomore year, if enrolled in a four-year degree program, or for not more than four additional years of instruction, including his sophomore year, if enrolled in a five-year degree program or a 3 plus 2 program. In addition, during his freshman year, the student must have successfully completed a total of at least fourteen credit hours of instruction in mathematics courses, or life and physical science courses, or a combination of both. A year is defined as thirty credit hours of instruction or its equivalent each year. To receive the additional LIFE Scholarship stipend each year, the student must receive the underlying LIFE Scholarship for that year and must be making acceptable progress each year toward receiving a degree in his science or mathematics major. . . .

State-Funded Undergraduate Scholarship and Grant Programs Appropriations

Beginning Appropriations for State Undergraduate Scholarships & Grants, FY 2013-14

	FY 2013-14*	% by Fund Source
Palmetto Fellows ⁽¹⁾ Total	\$51,216,550	100.0%
<i>portion from State General Funds</i>	\$20,439,310	39.9%
<i>portion from Lottery Revenues</i>	\$30,777,240	60.1%
LIFE ⁽¹⁾ Total	\$169,060,402	100.0%
<i>portion from State General Funds</i>	\$59,754,048	35.3%
<i>portion from Lottery Revenues</i>	\$109,306,354	64.7%
HOPE ⁽²⁾ Total	\$8,011,583	100.0%
<i>portion from State General Funds</i>	\$231,727	2.9%
<i>portion from Lottery Revenues</i>	\$7,779,856	97.1%
Sutotal Merit Programs (PF, LIFE HOPE)	\$228,288,535	100.0%
<i>portion from State General Funds</i>	\$80,425,085	35.2%
<i>portion from Lottery Revenues</i>	\$147,863,450	64.8%
Lottery Tuition Assistance (2-yr) ⁽²⁾ Total	\$49,100,000	100.0%
Need-based Grants ⁽³⁾ Total	\$25,000,000	100.0%
<i>portion from State General Funds</i>	\$12,000,000	48.0%
<i>portion from Lottery Revenues</i>	\$13,000,000	52.0%
Tuition Grants ⁽⁴⁾ Total	\$31,358,622	100.0%
<i>portion from State General Funds</i>	\$23,358,622	74.5%
<i>portion from Lottery Revenues</i>	\$8,000,000	25.5%
TOTAL All Programs	\$333,747,157	100.0%
<i>portion from State General Funds</i>	\$115,783,707	34.7%
<i>portion from Lottery Revenues</i>	\$217,963,450	65.3%

* Beginning year appropriations and additional funds may be appropriated for the open-ended programs (Footnote 1). Merit programs have been fully funded to date with regard to anticipated program needs.

Student financial aid incentive programs for SC National Guard members are not reflected here. As of 2007, a college assistance program was made available to Guard members in lieu of a prior loan repayment program for Guard members. Initial appropriations for the SCNG CAP program in FY 2013-14 are \$4.5 million.

⁽¹⁾ For the Palmetto Fellows and LIFE programs, additional amounts above initial appropriations may be provided since these are "open-ended" programs and qualified students are provided the awards. For Palmetto Fellows and LIFE, the General Assembly passed legislation effective FY 2008-09 that provided additional stipends beginning in the sophomore year to recipients of Palmetto Fellows and LIFE who are majoring in identified math, science, engineering and health-related majors and increased the amount of the Palmetto Fellows award beginning in the second year for all recipients.

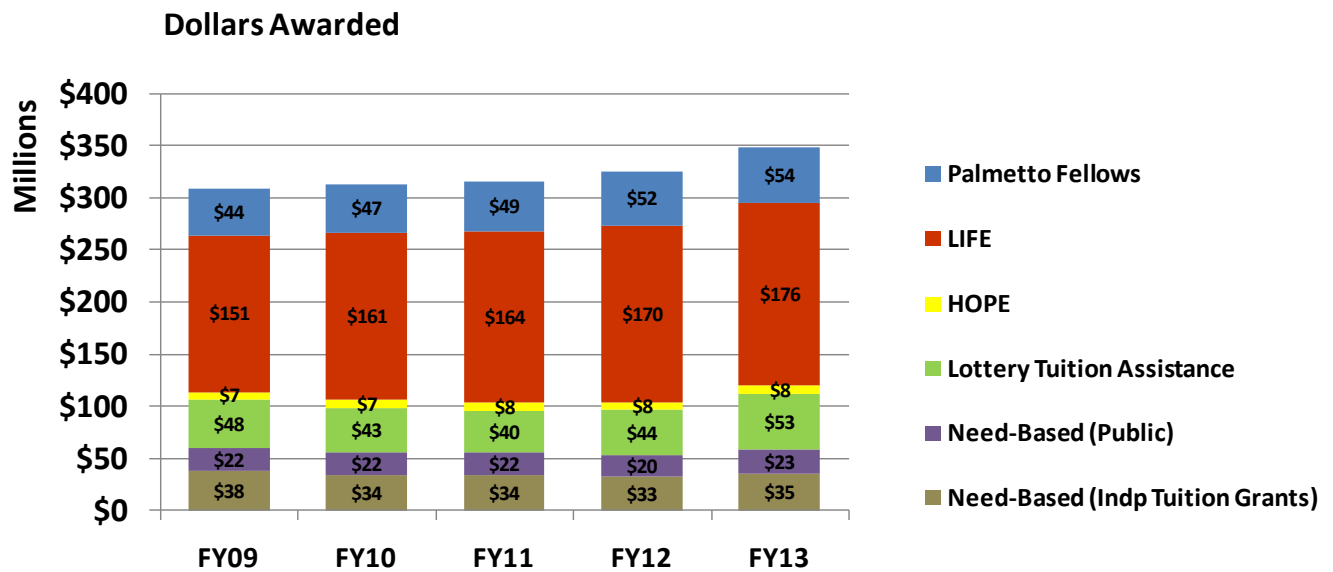
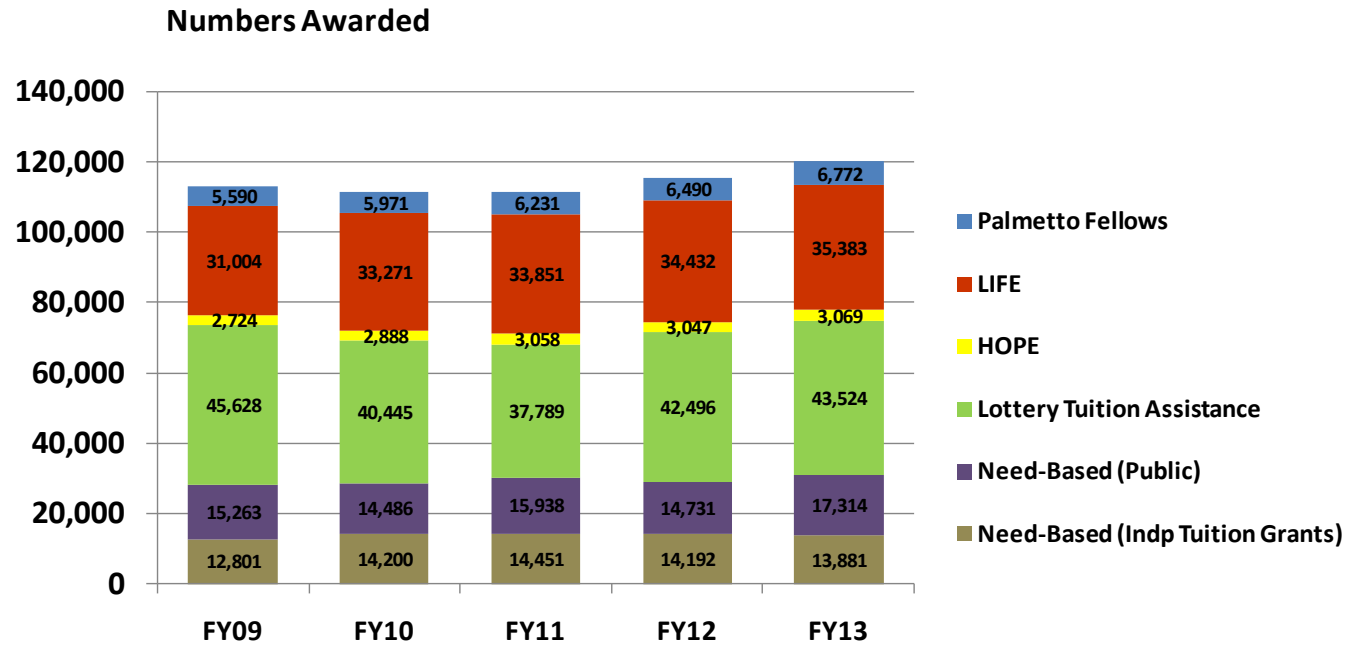
⁽²⁾ HOPE and Lottery Tuition Assistance for 2-Year Institutions began with the implementation of the Education Lottery in 2002.

⁽³⁾ For CHE Need-based Grants program a statutory provision requires that a portion of the available Need-based Grant funds each year must be allocated to independent institutions based on their share of full-time, in-state undergraduate enrollment in the prior fall. In fall 2012, the percentage enrollment share for the independent institutions was approximately 16%. See also note 4 regarding Tuition Grants.

⁽⁴⁾ Tuition Grants is a program managed by the SC Tuition Grants Commission and provides need-based grants to qualified students at SC's Independent Colleges and Universities. Funds shown reflect the portion appropriated to the SC Tuition Grants Commission for grants. In addition to the allocations shown here under for Tuition Grants, the program also receives by statute a share of funds appropriated to the Need-based Grant program (Footnote 3).

Source: Act 101 of 2013, FY 2013-14 Appropriations Act

State-Funded Undergraduate Scholarship and Grant Programs
Public and Independent Colleges and Universities
Awards by Year, Number and Dollars Awarded, FY 2008-09 – FY 2012-13



Of the awards to students for the state’s scholarship and grant program in FY 2013-14, 85% of the dollars and 15.3% of the awards were awarded to students attending the state’s public universities in FY 2013-14. By program: Dollars Awarded, 79% to students at public institutions for Palmetto Fellows, 83% for LIFE, and 99% for LTA, and 40% for Need-Based; Numbers Awarded, 78% to students at public institutions for Palmetto Fellows, 83% for LIFE, and 99% for LTA, and 56% for Need-Based.

Source: CHE Annual Disbursement Report and SC Tuition Grants Annual Accountability Reports

The tables below outline cohorts of students across fiscal year, illustrating cohorts without summer awards and with summer awards beginning in FY 2013-14 and FY 2014-15.

Traditional

	Fiscal Year																										
	13-14			14-15			15-16			16-17			17-18			18-19			19-20			20-21					
	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su			
Yr1 (FR)	1	2		3	4		5	6		7	8					1	2										
				1	2														1	2							
							1	2					1	2											1	2	
Yr2 (SO)	3	4		5	6		7	8					1	2								3	4				
							3	4																	3	4	
										3	4					3	4										
Yr3 (JR)	5	6		7	8					5	6								5	6					5	6	
										5	6								5	6							
													5	6								5	6				
Yr4 (SR)	7	8											7	8					7	8					7	8	
													7	8					7	8					7	8	
																7	8					7	8		7	8	
	4	4	0	4	4	0	4	4	0	4	4	0	4	4	0	4	4	0	4	4	0	4	4	0	4	4	0
	8			8			8			8			8			8			8			8			8		

Fast Track: Assume start in FY 13-14 -- Summer 14

	Fiscal Year																										
	13-14			14-15			15-16			16-17			17-18			18-19			19-20			20-21					
	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su			
Yr1 (FR)	1	2	3	4	5	6	7	8								1	2	3									
				1	2	3													1	2	3						
							1	2	3				1	2	3							1	2	3			
Yr2 (SO)	3	4	5	6	7	8							1	2	3							4	5	6			
							4	5	6																4	5	6
										4	5	6				4	5	6									
Yr3 (JR)	5	6	7	8						7	8								7	8					7	8	
										7	8								7	8							
													7	8								7	8				
Yr4 (SR)	7	8														7	8					7	8				
																7	8					7	8				
																			7	8					7	8	
	4	4	3	4	3	3	3	3	2	3	3	2	3	3	2	3	3	2	3	3	2	3	3	2	3	3	2
	11			10			8			8			8			8			8			8			8		

Fast Track: Assume start in FY 14-15 -- Summer 15

	Fiscal Year																										
	13-14			14-15			15-16			16-17			17-18			18-19			19-20			20-21					
	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su	F	Sp	Su			
Yr1 (FR)	1	2		3	4	5	6	7	8							1	2	3									
				1	2	3													1	2	3						
							1	2	3				1	2	3							1	2	3			
Yr2 (SO)	3	4		5	6	7	8						1	2	3							4	5	6			
							4	5	6																4	5	6
										4	5	6				4	5	6									
Yr3 (JR)	5	6		7	8					7	8								7	8					7	8	
										7	8								7	8							
													7	8								7	8				
Yr4 (SR)	7	8														7	8					7	8				
																7	8					7	8				
																			7	8					7	8	
	4	4	0	4	4	3	4	3	3	3	3	2	3	3	2	3	3	2	3	3	2	3	3	2	3	3	2
	8			11			10			8			8			8			8			8			8		

Summary data on summer enrollment and scholarship recipients and also for fiscal impact calculations, are provided in Excel files enclosed with this document.

Attachment 6a

Excel File: **Atta_Enrollment&Schol 2013-11-27**

This data file includes multiple worksheets.

- Headcount enrollment for residents (1+A-D categories of residency by fee purposes) for summer I&II, unduplicated, by year and public institution, 2011, 2012 and 2013
- Headcount enrollment for residents (1+A-D categories of residency by fee purposes) for summer I&II, as reported, by year and public institution, 2011, 2012 and 2013
- Summary data for spring 1st, 2nd, and 3rd year Palmetto Fellows, LIFE and HOPE recipients subsequently enrolled in the summer by institution by year, 2011, 2012, and 2013
- Detailed data for spring year Palmetto Fellows, LIFE and HOPE recipients subsequently enrolled in the summer by institution by student level and scholarship program. Worksheet for 2011, 2012, and 2013.
- Data by credit hours attempted in summer for spring year Palmetto Fellows, LIFE and HOPE recipients subsequently enrolled in the summer, by institution, by student level, and scholarship program. Worksheet for 2011, 2012, and 2013.

Attachment 6b

Excel File: **Attb_Fiscal Impact Data 2013-11-27**

This data file includes multiple worksheets.

- Summary of Fiscal Impact Methodologies. This worksheet provides a summary table for the estimated total cost for Palmetto Fellows and LIFE combined for each of the three methodologies considered.
- Select summary statistics by award for public institutions.
- Estimate using spring recipient data and subsequent summer enrollment for public institutions by program and by year, 2013, 2012 and 2011.
- Estimate for all institutions relying on scholarship disbursement data and applying estimated participation percentage that is based on review of public scholarship recipients and enrollment in summer using 1.5%, 2% and 3%. Worksheet for each year, 2011, 2012, and 2013
- Estimate for all institutions relying on scholarship disbursement data, applying estimated retention, and estimate participation based on review of public scholarship recipients and enrollment in summer. Worksheet for each year, 2011, 2012, and 2013.