

Professional School Counselor Training | November 2016

Massachusetts State Financial Aid



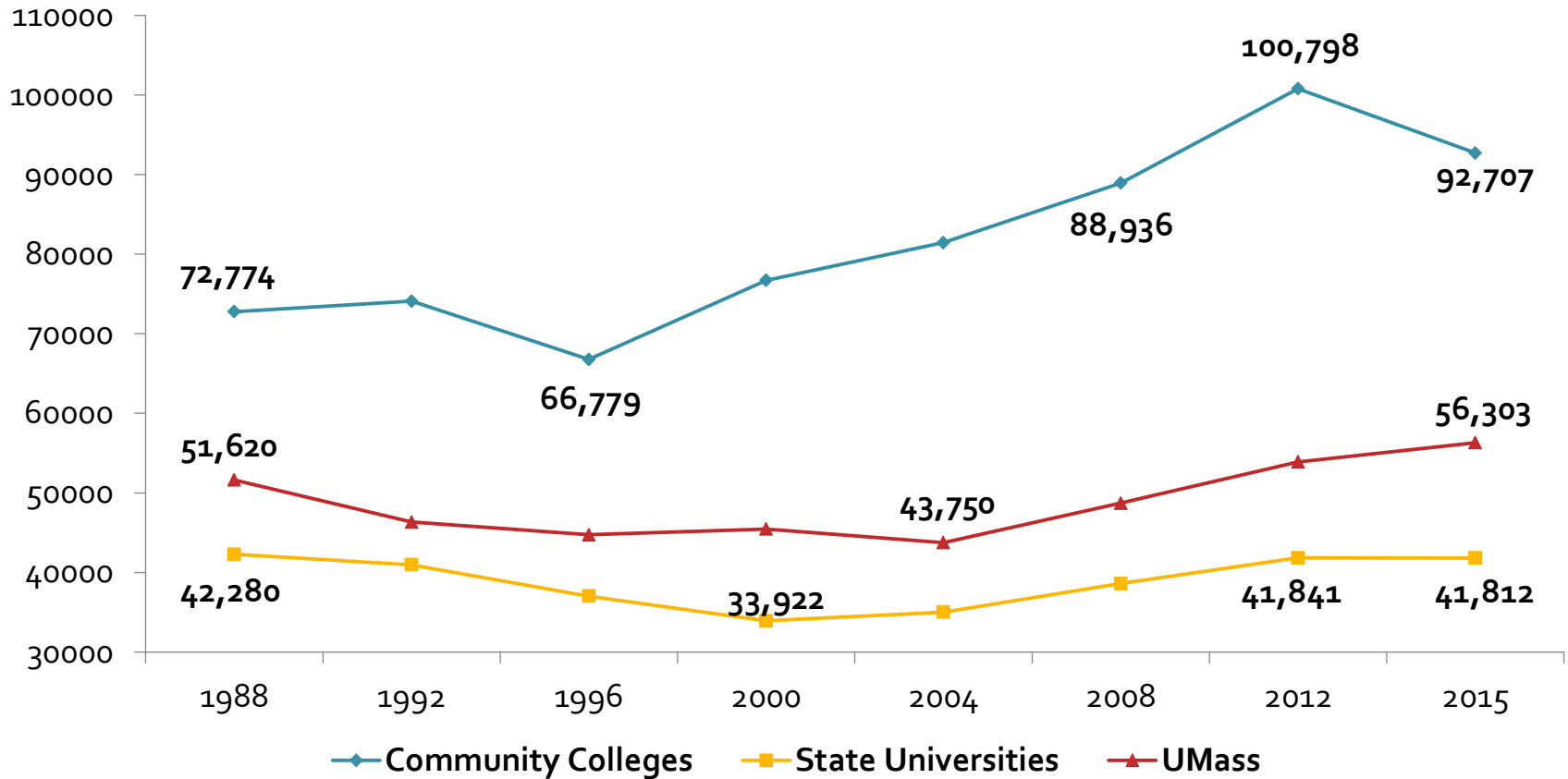
MASSACHUSETTS
Department of
Higher Education

Department of Higher Education

- Statutorily created agency responsible for defining the mission of and coordinating the Commonwealth's system of public higher education and its institutions
- The DHE is staff to the 13-member Board of Higher Education, responsible for executing the Board's policies and day-to-day operations
- DHE is responsible for:
 - Providing MA citizens with an opportunity to participate in academic and educational programs for personal betterment and growth
 - Contributing to the area's existing base of research and knowledge
 - Contributing to the Commonwealth's future economic growth and development

MA Public College Enrollment Trend

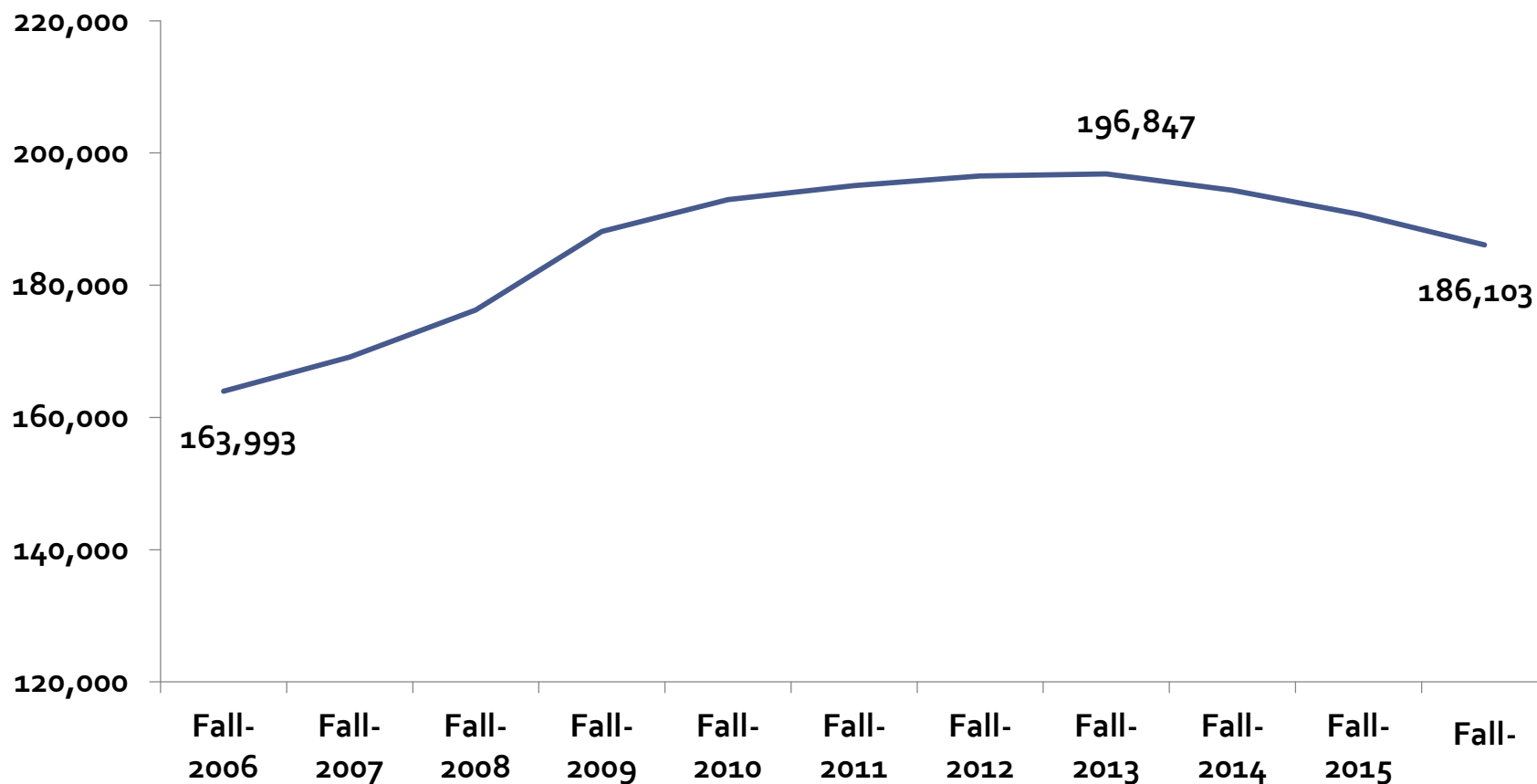
Fall Undergraduate Enrollment 1988–2015



Highlights: 2016 Enrollment Estimates

Third Year of Decline in Last 10 Years

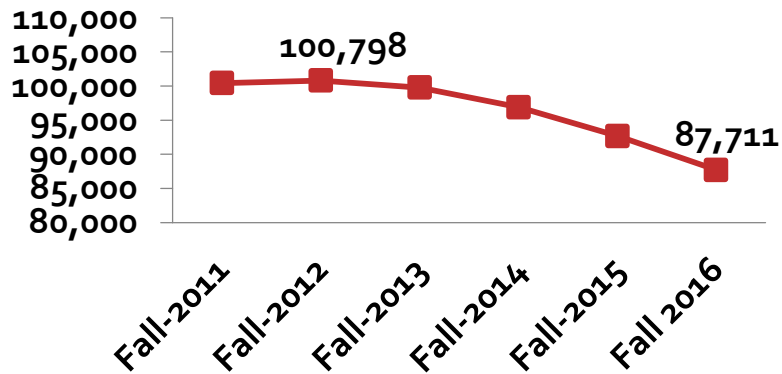
Fall Undergraduate Enrollment: System Total



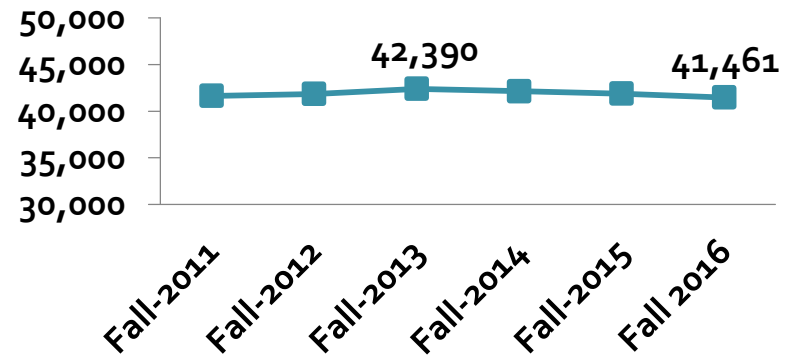
Highlights: 2016 Enrollment Estimates

Recent Enrollment Change Varies by Segment

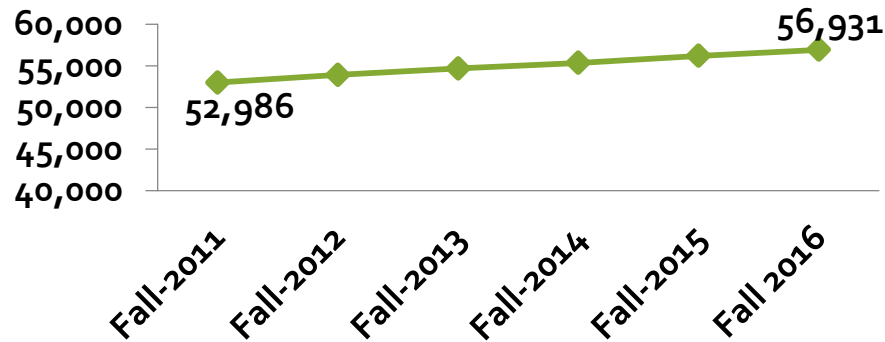
Community Colleges



State Universities



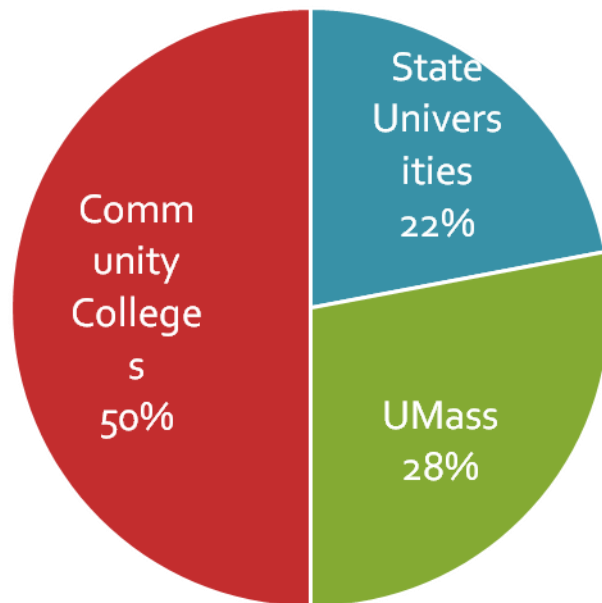
University of Massachusetts



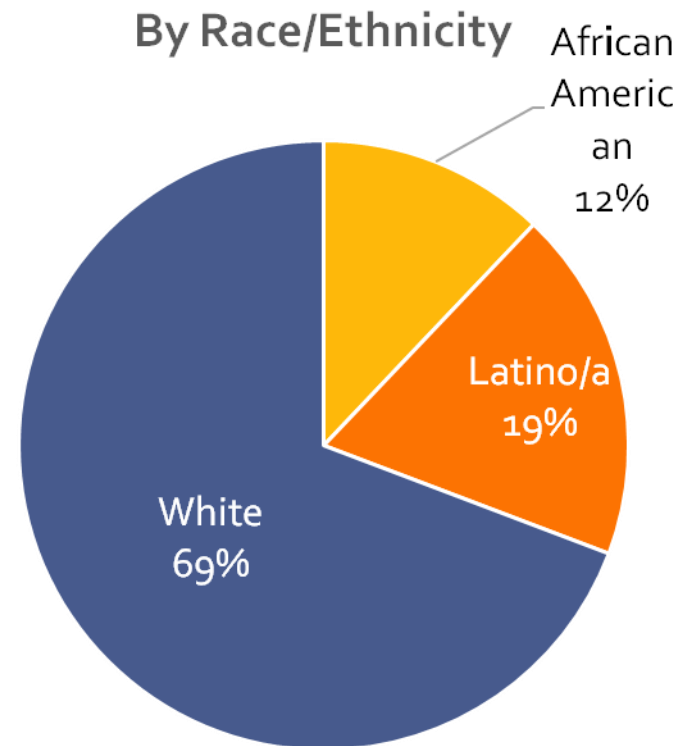
2015 New Students

- **33,907 Total 2015 New Students Enrolled in Massachusetts Public Higher Education**

By Segment

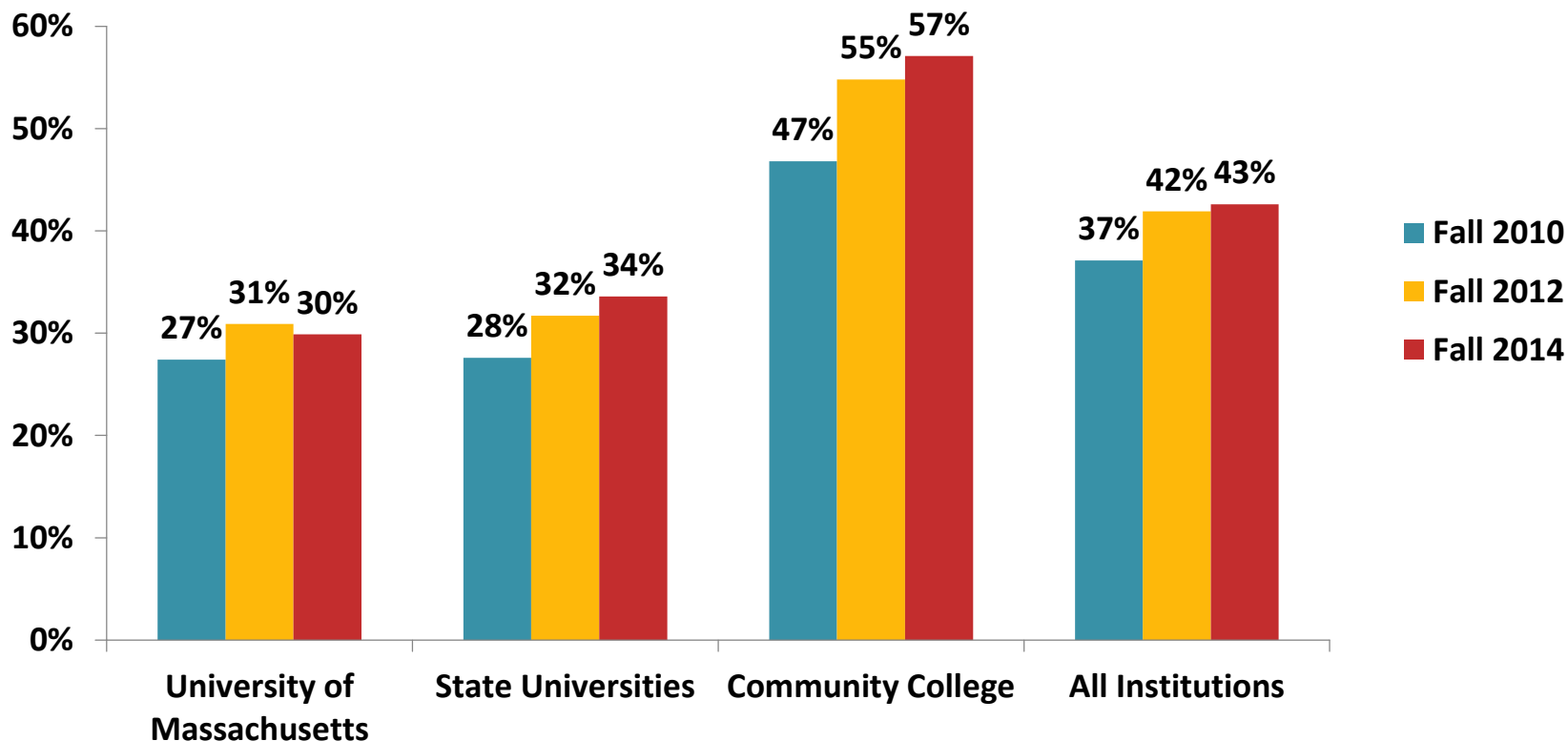


By Race/Ethnicity



% Pell Grant Recipient by Segment

Percent of First Time, Full Time Student Receiving Pell Grants



College Access, Affordability & Completion



**to College Access,
Affordability & Completion**

Builds on MassTransfer Pathways

Students commit to:

- **Complete associate degree w/in 2.5 years**
- **Transfer to public 4-year Complete bachelor's degree in 2 more years**
- **Maintain full time, continuous enrollment and a cumulative 3.0 GPA**
- **Locks in tuition/fee at cost during semester in which student enters the program**

College Access, Affordability & Completion

- Commonwealth Commitment students
 - **Freeze on tuition & fees** for all four years upon entry
 - A **10% rebate** off tuition & mandatory fees
 - **100% MassTransfer tuition credit** once student enrolls in bachelor's program



For more information, please visit:

<http://www.mass.edu/masstransfer/macomcom>

An Overview of Financial Aid Funding

- **Massachusetts Office of Student Financial Assistance has responsibility for both centralized and decentralized programs**
- **Because of the absence of earmarking, the Department of Higher Education (DHE) in concert with OSFA has flexibility to establish priorities for scholarship account**
- **MASSGrant remains the Commonwealth's flagship program that serves the largest number of students**
- **MASSGrant awards are indexed in accordance with Pell EFC**

Application Overview & Process

- FAFSA is the unique application for all state programs
- Annually, over **375,000 FAFSA applications** are submitted **from** Massachusetts residents seeking financial assistance for undergraduate degree and certificate programs
- Approximately **\$102m is available in FY 2017** from state appropriations for financial aid – an additional **\$60m** is awarded from a variety of **tuition waivers**
- State Financial Aid is processed through **MASSAid**, an online financial aid system accessible by both students and institutions

FAFSA Completion Issues

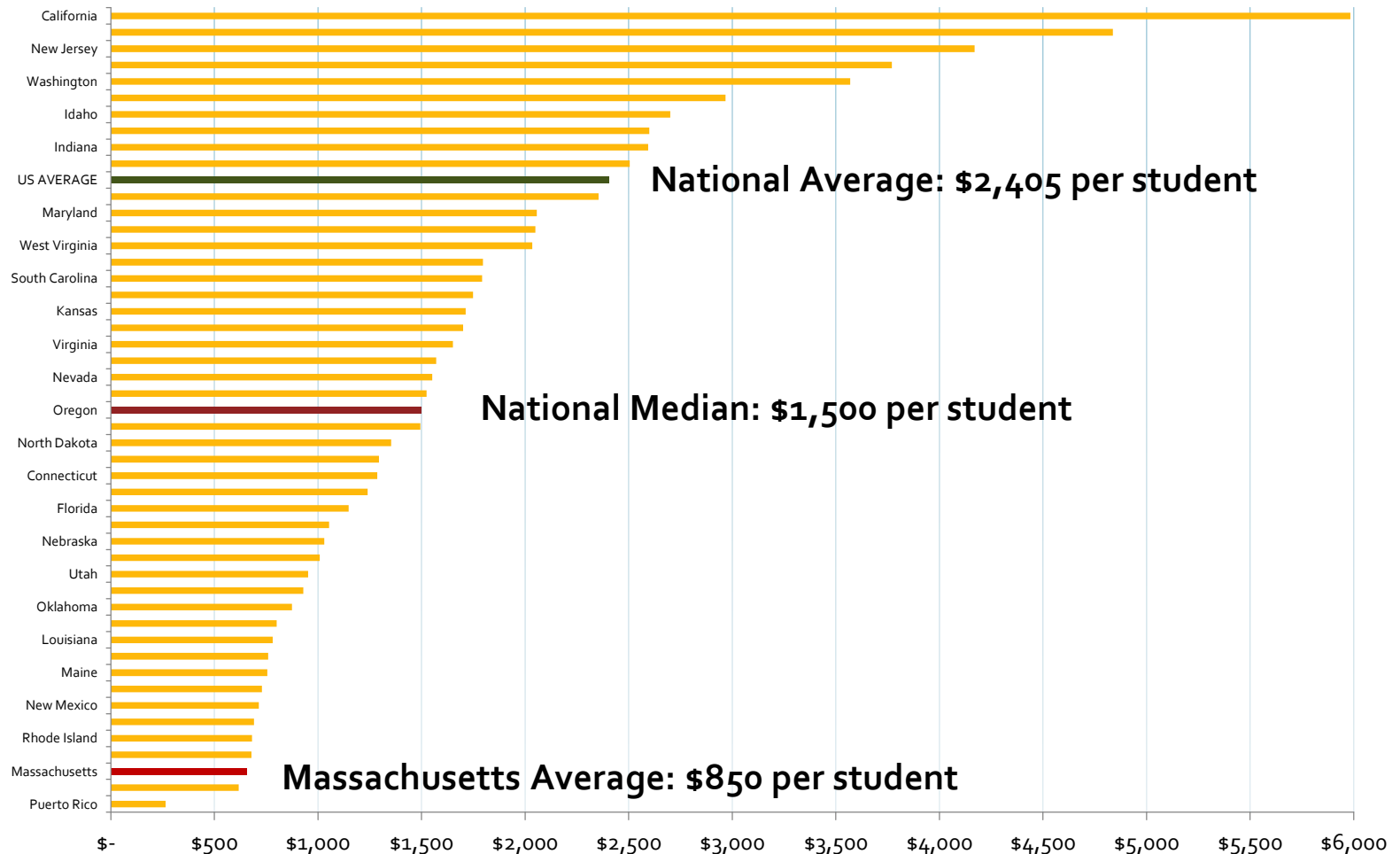
- Early FAFSA Data
 - Numbers are low, when comparing October and January
 - Majority are high school seniors – first time, never attended
 - Anticipate beginning award process in January
- FAFSA Data for High Schools
- Prior Prior Year (PPY)
 - could result in revisions to award from previous year, process will be monitored to determine extent
- Scrambling of college choice for 2018-19
 - May result in changes in award process

Sources of State Aid

- Massachusetts offers all traditional sources of financial aid: Scholarships, Grants, Tuition Waivers, Internships, and a No Interest Loan
- **94% of state financial aid is need-based;** other aid is entitlement based or related to Workforce Development initiatives
- State Funds are awarded to students through two processes:
 - **Centralized** – funds awarded to students directly by OSFA
 - **De-Centralized** – students awarded by the college - resources allocated to institutions based on a funding formula modeled designed for each specific program

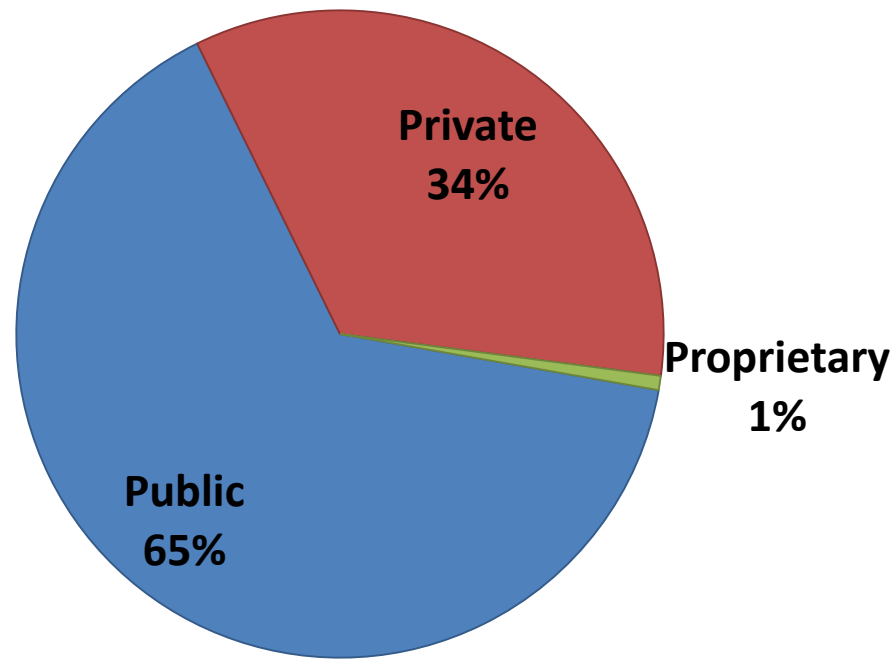
State Financial Aid – National Comparison

MA Ranking: Need Based Aid



Distribution of Funds

**General Scholarship Appropriation
Expenditure by Sector**



Centralized Programs

- **MASSGrant**
- **Paraprofessional Grant**
- **Early Childhood Educators Scholarship**
- **Herter Scholarship**
- **Public Service Grant**
- **CIGF Incentive Pilot (no longer funded)**
- **Foster Child Grant**
- **Foster and Adopted Fee Assistance**
- **Massachusetts High Demand Scholarship**

Decentralized programs

- **Community College Cash Grant**
- **State University Cash Grant**
- **University of Massachusetts Cash Grant**
- **Gilbert Grant**
- **Part-Time Grant**
- **One Family, Inc. Scholars Program**

MASSGrant Program

- Largest state funded financial aid program
- Provides **assistance** to students demonstrating the **greatest financial need**
- MASSGrant program continues to see increases in both the number of applicants and their need for assistance
- **Any student who files an appropriate year FAFSA as a MA resident automatically applies for a MASSGrant**
- **Any student who files the FAFSA on or before May 1 of each year is considered an on-time applicant**
- Applicants must also be Pell eligible
- **The value of MASSGrant has eroded significantly over the past two decades** – even so this program remains the largest state funded financial aid program, serving an average of 56,000 annually

Tuition Waiver Expenditures

- Massachusetts **waives** an additional **\$60million** in tuition annually – which contributes significantly to the amount of state resources designed to help make college more affordable for students who attend public institutions in the Commonwealth. Such waivers are awarded under programs that include the following:
 - **\$19m** Need-Based Tuition Waivers
 - **\$16m** John and Abigail Adams Scholarship
 - **\$2.2m** Koplik Certificate of Mastery
 - **\$.2m** Valedictorian Tuition Waiver
 - **\$1.1m** Adopted & Foster Child Tuition Waivers

John and Abigail Adams Scholarship

- **Since 2005, over 236,000 students designated as Adams Scholars**
- **11,500** – average annual number of students receiving the Adams Tuition Waiver (number increases slightly each academic year)
- **\$16 million** - average amount of tuition waived each year
- Majority of these students enroll at the University of Massachusetts four campuses
- Eligible students receive a “tuition credit” , depending on which public college attended

Koplik Certificate of Mastery

- Students invited to apply based on MCAS performance
- Additional selection criteria include SAT subject scores
- AP coursework/exam scores
- Recipient must attend a public college upon graduation
- Eligible students receive “waiver of tuition” for eight consecutive semesters
- Must complete the FAFSA annually
- Must maintain 3.3 GPA (cumulative)

Christian Herter Scholarship

- Competitive four-year scholarship
- Applicants must be nominated during Sophomore or Junior year by a school official or community agency
- Recipients must demonstrate financial need and show evidence of extenuating circumstances
- Recipient may enroll in any postsecondary institution in the continental USA
- Scholarship may not exceed one-half of student's demonstrated financial need
- Average annual award is \$16,500

Christian Herter Scholarship

- 2017 applications will be circulated in late November to high schools and community organizations, and college access programs
- **2017 application deadline: mid-FEBRUARY 2017**
- Completed application **must be received** by the deadline
- Contact OSFA at (617) 391-6070 to request applications or more information
- 25 students selected annually from a pool of roughly 400 applications
- Scholarship is completely portable to a college in any state

Christian Herter Scholarship

List of Colleges Students Currently Attend

■ **Out-of-State – National & Regional**

- Brown, Princeton, Dartmouth, Harvard, Hamilton, Georgetown, Duke
- American University, George Washington University, Georgetown, Wesleyan
- Bowdoin, Middlebury, NYU Polytechnic, New York University, Union College
- Fairfield University, Wesleyan, University of Connecticut, Providence College
- Northwestern, American University, Carnegie Mellon, Baker University (KS)
- University of California - San Diego, California Polytechnic, University of Georgia, University of Alabama

■ **Massachusetts – Public & Private**

- UMASS – Amherst, Boston, Dartmouth, Lowell; Bridgewater, Fitchburg State, Salem State University, Westfield State, Framingham State, Mass College of Liberal Arts
- Harvard, Northeastern, Boston College, Boston University, Bentley, Brandeis, College of the Holy Cross, Regis, Stonehill College, Mass College of Pharmacy, Mt. Holyoke, Suffolk University, Western New England University, Wheelock College, Lesley University, Clark University, Assumption College

Foster Child Grant

- Annual grant up to **\$6,000**
- Awarded to Massachusetts residents who were placed in the custody of the Department of Children and Family (DCF) under a Care and Protection Petition
- Foster Child must **sign an agreement for extended care beyond age 18** to be eligible for grant assistance
- Recipient must annually complete the FAFSA and meet all federal and state eligibility criteria
- Grant is portable to any accredited college in the USA
- **Approximately 300** students qualify for grants each year

Adopted & Foster Child Fee Assistance

- Available only to **eligible students** who attend **Massachusetts public colleges**
- Student must provide college with documentation of eligibility from the Department of Children and Families
- Amended statute provides for coverage of tuition and fees
- **100% of fall and spring semester fees** covered for all eligible students during the past three academic years
- Program **supports an annual average of 900 students**

OSFA Contact Information

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