FINANCIAL AID & SCHOLARSHIP ADVISORY COMMITTEE
Meeting Minutes

Thursday, October 24th, 2013 | 2:00 – 3:30 PM | Campus Center, Room 306

Present:
Bob Borris, Susan Brown, Krishna Dhir, Karla Hayashi, Luoluo Hong, Dexter Irvin, Keiki Kawai’ae’a, Jim Mellon, Matt Platz, Natalie Savona, Mike Shintaku, Len Woods

I. Committee members introduced themselves. Luoluo Hong reviewed the purpose of the committee, which is to recommend the distribution of student financial assistance resources to students in a manner that supports UH Hilo mission and strategic enrollment management priorities.

II. Financial Aid Office Update: Luoluo Hong reported on some of the highlights of a written report provided by Interim Director of Financial Aid Lynette Egusa, including:
   a. There was a slight decrease in the number of financial aid applications for 2013-2014 (not surprising given the decrease in enrollment).
   b. The US Department of Education has changed the way default rates are calculated: default rates are now calculated on a 3-year basis (rather than on a 2-year basis). UH Hilo has historically had relatively low default rates.
   c. About half of the students who received financial aid were awarded a Pell Grant as part of their financial aid package.
   d. 119 students were awarded Federal Work-Study.

III. Review of FY 2013-14 tuition assistance allocations; projections for 2014-15 allocations
   a. Luoluo Hong reviewed the financial aid packaging guidelines, which strive to award financially needy students 45% of their award in gift aid (e.g., Pell grants, need-based tuition scholarships) and 55% in a variety of “self-help” aid (e.g., loans, Federal Work-Study).
   b. Luoluo Hong reviewed the tuition assistance allocations for 2013-2014, which were recommended by the Committee and approved by the Chancellor.
   c. In 2013-2014, 17% of the tuition revenue collected the previous academic year was available to be allocated. In 2014-2015, this will increase to 18%. We will not know the actual dollar figure until the enrollment census is taken in Spring 2014.
   d. Luoluo Hong asked if we want to propose any changes to the principles that guide that allocation of available tuition assistance dollars. The committee discussed the Second Century scholarships and additional tuition assistance allocation to the College of Pharmacy first, and then returned to this question (see below)
IV. Second Century Scholarships:
   a. There has been a change in the UH System funding model. In the past, these
      scholarships were funded through RTRF funds at the System level; the dollar
      amount was divided up proportionately to each campus. At the end of last year, we
      were told that RTRF could no longer be used. The Chancellors agreed to continue
      the scholarship program, so a new source of funding is needed to continue funding
      it. For UH Hilo, approximately $180,000 would be needed.
   b. The question was raised as to whether the committee wanted to recommend that a
      portion of the tuition assistance fund be allocated to fund the scholarship program.
      The consensus was to recommend that resources other than the funds available
      from the tuition assistance program be secured to fund the program and to track
      the program to determine its effectiveness. The purpose of the program (i.e., to
      reduce debt load) does not seem to justify taking funds away from existing tuition
      assistance resources because the students already have financial aid. Other
      concerns raised were the amount of funds needed, which is significant relevant to
      existing tuition assistance allocations, and a lack of data demonstrating that the
      scholarship has been impactful and effective in increasing Native Hawaiian
      retention and graduation.

V. Additional tuition assistance allocation to College of Pharmacy - $200,000:
   a. At the end of last year the College of Pharmacy requested of the Chancellor an
      additional $200,000 in tuition assistance dollars for 2013-2014. The Chancellor
      provided the funds, and asked the Committee to discuss this for 2014-2015.
   b. The consensus was not to recommend that the College be allocated an additional
      $200,000 from the tuition assistance funds. Reasons included the following:
      i. Doing so would not substantively help with recruitment and retention
         (which is not a problem in the College of Pharmacy);
      ii. Amount of funds requested is significant relevant to existing tuition
          assistance allocations;
      iii. While there was an acknowledgement of the “business model” concern for
           the College, allocating an additional $200,000 from the tuition assistance
           fund does not fix that particular problem; it would be more a symbolic
           gesture;
      iv. All pre-pharmacy students are in other colleges; and
      v. Allocating the limited existing resources maximizes benefits throughout the
         campus.

VI. Awarding Merit-Based Scholarships:
   a. Question was raised whether a College can award a scholarship to another student
      if the student who was originally offered the scholarship does not enroll. If a unit
      does not use all of its allocated funds, the Financial Aid Office has been awarding
      the scholarship funds to other (financially needy) students. However, Luoluo Hong
said that she would work with the Financial Aid Office to better enable units to award scholarships in such situations.

b. It was decided that at the next meeting each unit will provide a brief report on its scholarship awarding processes for 2013-2014, i.e., what were the goals, how did the unit go about trying to accomplish the goals, how well it worked, etc. The purpose is to assist units with improving its processes.

c. Dexter Irvin offered to share Athletics Department practices for recruiting students with other units who are interested in recruiting students.

VII. Discussion of non-resident tuition exemptions approved by BOR in May 2013:

a. Overview of purpose & background on BOR action: Initiated to help UH Manoa deal with the structural financial deficit in the Athletics Department. Each campus is permitted to provide an exemption to non-resident tuition to allow a certain number of non-resident students with “special talents and/or unique skills that will make a significant contribution to campus life.”

b. Report on awards made for AY 2013-14: UH Manoa is eligible for 200 such exemptions and provided 171. UH Hilo is eligible for 80, and provided 6. The maximum number is 2% of the campus’ total enrollment from the previous fall semester.

c. Recommended implementation for AY 2014-15: Options presented included:

i. Do not use them at all

ii. Use them and give them all to units other than Athletics – in that scenario, we will need to define terms such as “special talent” and “significant contribution to campus life”

iii. Use them and give them all to Athletics

iv. Use them, giving some to Athletics and some to other units

v. Consensus was to use 60 for Athletics in the first year, and use the remaining 20 to be divided up among other units, and then review and evaluate it to determine how to proceed for the following year.

Respectfully submitted by Jim Mellon
Financial Aid Applications received:

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>End of September</th>
<th>Change</th>
<th>Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0910</td>
<td>5643</td>
<td></td>
<td>6126</td>
</tr>
<tr>
<td>1011</td>
<td>6384</td>
<td>+741</td>
<td>+13%</td>
</tr>
<tr>
<td>1112</td>
<td>6787</td>
<td>+403</td>
<td>+6%</td>
</tr>
<tr>
<td>1213</td>
<td>7605</td>
<td>+818</td>
<td>+12%</td>
</tr>
<tr>
<td>1314</td>
<td>7542</td>
<td>-63</td>
<td>-.8%</td>
</tr>
</tbody>
</table>

Financial Aid Awards made as of September:

1213   3759

1314   3689   -70   -1.9% (continuing to award)

Student Loan Default Rate:

Issued in 2013

FY 2011:  2 year rate 6.3%  Borrower in Repayment: 723
FY 2011:  2 year rate National Rate: 9.1%  Public School Rate: 8.3%

US Department of Education will no longer use the 2 year cohort rate. It is being converted to the 3 year cohort rate.

FY 2009  3 year rate 9.3%  Borrowers in Repayment: 588
FY 2010  3 year rate 8.3%  Borrowers in Repayment: 650
FY 2010: 3 year rate National Rate: 14.7%  Public School Rate: 9.3%

Federal Pell Grant:

Number of Awarded: 1927  Total for Award Year: $7,458,579.00
(49% of students awarded receive Federal Pell Grant)
We are still processing.

Federal Work Study:  (Student must work to earn) –

Number of student paid: 119
Earned: $29,139.01 (actual hours worked as of 9/15/13) This is due to the payroll lag. Recently hired student are not included on the payroll yet.
Financial Aid Applications received:

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>End of September</th>
<th>Change</th>
<th>Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0910</td>
<td>5643</td>
<td></td>
<td>6126</td>
</tr>
<tr>
<td>1011</td>
<td>6384</td>
<td>+741</td>
<td>+13% 6887</td>
</tr>
<tr>
<td>1112</td>
<td>6787</td>
<td>+403</td>
<td>+6% 7396</td>
</tr>
<tr>
<td>1213</td>
<td>7605</td>
<td>+818</td>
<td>+12% 8318</td>
</tr>
<tr>
<td>1314</td>
<td>7542</td>
<td>-63</td>
<td>-.8%</td>
</tr>
</tbody>
</table>

Financial Aid Awards made as of September:

1213 3759
1314 3689 -70 -1.9% (continuing to award)

Student Loan Default Rate:

Issued in 2013

FY 2011: 2 year rate 6.3% Borrower in Repayment: 723
FY 2011: 2 year rate National Rate: 9.1% Public School Rate: 8.3%

US Department of Education will no longer use the 2 year cohort rate. It is being converted to the 3 year cohort rate.

FY 2009 3 year rate 9.3% Borrowers in Repayment: 588
FY 2010 3 year rate 8.3% Borrowers in Repayment: 650
FY 2010: 3 year rate National Rate: 14.7% Public School Rate: 9.3%

Federal Pell Grant:

Number of Awarded: 1927 Total for Award Year: $7,458,579.00
(49% of students awarded receive Federal Pell Grant)
We are still processing.

Federal Work Study: (Student must work to earn) –

Number of student paid: 119
Earned: $29,139.01 (actual hours worked as of 9/15/13) This is due to the payroll lag. Recently hired student are not included on the payroll yet.
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Grants</td>
<td>$3,816,802.00</td>
<td>$7,429,680.00</td>
<td>$7,479,241.00</td>
<td>$7,707,252.00</td>
<td>$6,798,148.00</td>
<td>$4,397,870.00</td>
<td>$4,033,650.00</td>
<td>$3,683,310.00</td>
<td>$3,610,810.00</td>
<td>$3,747,812.00</td>
<td>$3,764,686.00</td>
<td>$3,196,717.00</td>
<td>$2,835,800.00</td>
</tr>
<tr>
<td>Federal Work-Study (earnings)</td>
<td>$29,139.01</td>
<td>$353,610.00</td>
<td>$360,565.00</td>
<td>$357,284.00</td>
<td>$320,873.00</td>
<td>$380,998.00</td>
<td>$331,921.00</td>
<td>$337,809.00</td>
<td>$345,929.00</td>
<td>$372,027.00</td>
<td>$322,584.00</td>
<td>$370,294.00</td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$25,828,528.00</td>
<td>$26,782,393.00</td>
<td>$24,495,038.00</td>
<td>$20,607,832.00</td>
<td>$10,745,557.00</td>
<td>$7,250,046.00</td>
<td>$7,049,655.00</td>
<td>$6,864,323.00</td>
<td>$5,948,331.00</td>
<td>$3,574,249.00</td>
<td>$2,835,800.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$323,054.00</td>
<td>$704,000.00</td>
<td>$803,243.00</td>
<td>$733,146.00</td>
<td>$128,762.00</td>
<td>$33,320.00</td>
<td>$34,573.00</td>
<td>$28,640.00</td>
<td>$29,766.00</td>
<td>$25,324.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$81,868.00</td>
<td>$154,926.00</td>
<td>$166,922.00</td>
<td>$210,415.00</td>
<td>$196,825.00</td>
<td>$176,825.00</td>
<td>$179,018.00</td>
<td>$327,040.00</td>
<td>$174,380.00</td>
<td>$316,125.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$2,791,408.00</td>
<td>$5,152,444.00</td>
<td>$4,319,487.00</td>
<td>$2,905,942.00</td>
<td>$1,966,646.00</td>
<td>$1,669,184.00</td>
<td>$1,353,957.00</td>
<td>$1,207,164.00</td>
<td>$989,149.00</td>
<td>$1,041,832.00</td>
<td>$1,020,443.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$213,383.00</td>
<td>$485,765.00</td>
<td>$356,577.00</td>
<td>$371,005.00</td>
<td>$115,034.00</td>
<td>$176,191.00</td>
<td>$168,449.00</td>
<td>$84,976.00</td>
<td>$28,866.00</td>
<td>$50,407.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$331,745.00</td>
<td>$657,108.00</td>
<td>$534,323.00</td>
<td>$441,000.00</td>
<td>$298,475.00</td>
<td>$286,027.00</td>
<td>$281,740.00</td>
<td>$315,345.00</td>
<td>$286,297.00</td>
<td>$33,816.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$1,077,085.00</td>
<td>$4,013,141.00</td>
<td>$4,188,400.00</td>
<td>$3,384,899.00</td>
<td>$3,248,610.00</td>
<td>$2,809,769.00</td>
<td>$2,470,673.00</td>
<td>$1,494,249.00</td>
<td>$1,348,800.00</td>
<td>$2,225,000.00</td>
<td>$2,234,706.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work-Study</td>
<td>$1,073,090.00</td>
<td>$1,004,255.00</td>
<td>$968,283.00</td>
<td>$762,468.00</td>
<td>$788,991.00</td>
<td>$1,207,175.00</td>
<td>$979,251.00</td>
<td>$1,010,447.00</td>
<td>$665,577.00</td>
<td>$474,825.00</td>
<td>$394,714.00</td>
<td>$185,456.00</td>
<td>$124,814.00</td>
</tr>
<tr>
<td>Total</td>
<td>$35,566,682.51</td>
<td>$44,797,322.00</td>
<td>$44,471,489.00</td>
<td>$42,024,149.00</td>
<td>$36,463,264.00</td>
<td>$27,689,257.00</td>
<td>$21,632,448.00</td>
<td>$17,239,898.00</td>
<td>$15,216,349.00</td>
<td>$14,966,921.00</td>
<td>$13,169,988.00</td>
<td>$10,860,599.00</td>
<td>$10,214,249.00</td>
</tr>
<tr>
<td>Change</td>
<td>5%</td>
<td>6%</td>
<td>15%</td>
<td>32%</td>
<td>28%</td>
<td>25%</td>
<td>13%</td>
<td>2%</td>
<td>14%</td>
<td>21%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awarded &amp; Canceled</td>
<td>$24,812,201.00</td>
<td>$26,524,135.00</td>
<td>$23,099,880.00</td>
<td>$21,066,340.00</td>
<td>$19,353,959.00</td>
<td>$15,518,900.00</td>
<td>$11,358,209.00</td>
<td>$9,618,966.00</td>
<td>$8,435,862.00</td>
<td>$8,915,353.00</td>
<td>$8,570,482.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicants</td>
<td>7594</td>
<td>8316</td>
<td>7395</td>
<td>6887</td>
<td>6126</td>
<td>5243</td>
<td>4507</td>
<td>4268</td>
<td>4669</td>
<td>4973</td>
<td>4726</td>
<td>2500</td>
<td>2000</td>
</tr>
<tr>
<td>FAFSAs processed</td>
<td>14730</td>
<td>16669</td>
<td>14660</td>
<td>14082</td>
<td>11904</td>
<td>10078</td>
<td>8700</td>
<td>8044</td>
<td>7823</td>
<td>7672</td>
<td>7494</td>
<td>7278</td>
<td>6906</td>
</tr>
<tr>
<td>Awarded</td>
<td>3718</td>
<td>4087</td>
<td>3953</td>
<td>3825</td>
<td>3608</td>
<td>3100</td>
<td>2696</td>
<td>2543</td>
<td>2514</td>
<td>2548</td>
<td>2589</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recipients</td>
<td>2992</td>
<td>3365</td>
<td>3341</td>
<td>3185</td>
<td>3017</td>
<td>2873</td>
<td>2432</td>
<td>2156</td>
<td>2104</td>
<td>2086</td>
<td>1957</td>
<td>1635</td>
<td>1470</td>
</tr>
<tr>
<td>Change</td>
<td>1%</td>
<td>5%</td>
<td>6%</td>
<td>13%</td>
<td>10%</td>
<td>12%</td>
<td>2%</td>
<td>1%</td>
<td>7%</td>
<td>20%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default Rate</td>
<td>0.30%</td>
<td>4.80%</td>
<td>5.00%</td>
<td>5.60%</td>
<td>5.10%</td>
<td>2.30%</td>
<td>2.80%</td>
<td>4.60%</td>
<td>4.20%</td>
<td>4.30%</td>
<td>6.80%</td>
<td>6.60%</td>
<td>7.90%</td>
</tr>
<tr>
<td>Borrowers</td>
<td>723</td>
<td>655</td>
<td>590</td>
<td>569</td>
<td>547</td>
<td>576</td>
<td>568</td>
<td>587</td>
<td>569</td>
<td>587</td>
<td>569</td>
<td>587</td>
<td>590</td>
</tr>
<tr>
<td>Staff Members</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>
DATE: April 11, 2013

TO: Donald O. Straney, Chancellor

FROM: Luoluo Hong, Vice Chancellor for Student Affairs

CC: Members of the Financial Aid & Scholarship Advisory Committee

RE: Recommendation for 2013-14 Tuition-Based Financial Assistance Allocation - Resubmission

Attached for your review and approval is the recommended 2013-14 Financial Assistance Allocation for the University of Hawai‘i at Hilo, which was approved by members of the UH Hilo Financial Aid & Scholarship Advisory Committee at their most recent meeting on April 2, 2013. The voting results were: ten for, none against, and one abstaining. The members of the Advisory Committee are copied on this memo; note that all degree-granting academic colleges are represented, along with the UH Hilo Student Association and several Student Affairs units that have a vested interest in financial aid policy decisions.

As in the past, the merit pool allocated to the academic colleges is further distributed each academic year on the basis of the distribution of major headcount as of the previous Fall term. That analysis for Fall 2012, provided by Mason Kuo, Institutional Research Analyst, is attached to the tuition assistance allocation proposal. Also, please note that approximately $55,000 in tuition assistance remains available for allocation to support strategic priorities; the Committee will meet later in April to make further recommendations to you in this regard.

One notable change was recommended by the Advisory Committee for 2013-14. Funds to support scholarships for degree-seeking international students were separated from the general Division of Student Affairs allocation (in the amount of $78,000), and funds from International Exchange Scholarships - previously totaling $100,000 in 2012-13 - were transferred into this allocation. This is to facilitate more strategic investments in modest tuition discounting programs so as to enroll and retain more international students at UH Hilo – a key strategic enrollment management goal for UH Hilo. Total investment for international
exchange scholarships will be capped at the 2012-13 level, although the cap does not preclude using other sources of funding for this purpose. As more tuition assistance funds become available in the future to augment international student scholarships, these will be earmarked to support degree-seeking students.

Please do not hesitate to let me know if you have any questions about this recommendation that I may answer, or if you would like to meet with members of the Financial Aid & Scholarship Advisory Committee prior to making a decision on their recommendation. Thank you for your review and decision on this recommendation.

Attachments (3):
- 2013-14 UH Hilo Financial Assistance Allocation – recommendation (revised)
- Recommended distribution for academic colleges merit pool, 2013-14
- Roster for the Financial Aid & Scholarship Advisory Committee, 2013-14
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Grants (need-based) - mandated as 60% minimum of financial assistance allocation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Aid $1,700,000.00</td>
<td>$2,055,608.00</td>
<td>$2,325,375.00</td>
<td>$3,090,000.00</td>
<td>$3,350,500.00</td>
<td>8.4%</td>
<td></td>
</tr>
<tr>
<td>$125,000 for students of Hawaiian Ancestry; $125,000 for resident graduate/prof students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pacific Islander Scholarship</td>
<td>$250,000.00</td>
<td>$450,000.00</td>
<td>$493,650.00</td>
<td>$550,000.00</td>
<td>$650,000.00</td>
<td>18.2%</td>
</tr>
<tr>
<td>• undergraduate, graduate &amp; professional students are eligible if meet criteria</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-total for Need-Based</td>
<td>$1,950,000.00</td>
<td>$2,505,608.00</td>
<td>$2,819,025.00</td>
<td>$3,640,000.00</td>
<td>$4,000,500.00</td>
<td>9.9%</td>
</tr>
<tr>
<td>Achievement Based - allowable as 40% maximum of financial assistance allocation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chancellor’s Scholars $2</td>
<td>$247,536.00</td>
<td>$286,272.00</td>
<td>$270,720.00</td>
<td>$341,040.00</td>
<td>$421,056.00</td>
<td>23.5%</td>
</tr>
<tr>
<td>Presidential &amp; Regents Scholars</td>
<td>$29,460.00</td>
<td>$51,120.00</td>
<td>$56,385.36</td>
<td>$52,920.00</td>
<td>$30,960.00</td>
<td>-41.5%</td>
</tr>
<tr>
<td>Centennial Scholarships</td>
<td>$100,000.00</td>
<td>$150,000.00</td>
<td>$165,450.00</td>
<td>$125,000.00</td>
<td>$135,000.00</td>
<td>8.0%</td>
</tr>
<tr>
<td>Academic Colleges - central merit pool $4</td>
<td>$161,500.00</td>
<td>$191,000.00</td>
<td>$203,219.64</td>
<td>$203,220.00</td>
<td>$209,316.00</td>
<td>3.0%</td>
</tr>
<tr>
<td>Office of intercollegiate Athletics</td>
<td>$366,500.00</td>
<td>$385,000.00</td>
<td>$392,700.00</td>
<td>$392,700.00</td>
<td>$404,481.00</td>
<td>3.0%</td>
</tr>
<tr>
<td>College of Pharmacy</td>
<td>$8,500.00</td>
<td>$50,000.00</td>
<td>$225,000.00</td>
<td>$225,000.00</td>
<td>$231,750.00</td>
<td>3.0%</td>
</tr>
<tr>
<td>Division of Student Affairs - campus-wide $5</td>
<td>$31,460.00</td>
<td>$16,000.00</td>
<td>$75,000.00</td>
<td>$120,140.00</td>
<td>$45,744.00</td>
<td>-61.9%</td>
</tr>
<tr>
<td>Admissions Office</td>
<td>$10,000.00</td>
<td>$11,000.00</td>
<td>$11,000.00</td>
<td>$11,000.00</td>
<td>$11,000.00</td>
<td>-</td>
</tr>
<tr>
<td>International Student Scholarships $6</td>
<td>$65,000.00</td>
<td>$69,000.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>International Exchange Scholarships $7</td>
<td>$104,000.00</td>
<td>$110,000.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sub-total for Achievement-Based</td>
<td>$1,123,950.00</td>
<td>$1,319,392.00</td>
<td>$1,388,475.00</td>
<td>$1,560,020.00</td>
<td>$1,659,307.00</td>
<td>6.4%</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>$3,070,000.00</strong></td>
<td><strong>3,825,000.00</strong></td>
<td><strong>4,207,500.00</strong></td>
<td><strong>5,200,020.00</strong></td>
<td><strong>5,715,000.00</strong></td>
<td><strong>9.9%</strong></td>
</tr>
</tbody>
</table>

**NOTES:**
1. Per UH System policy, 15% of tuition revenue from prior year must be allocated to financial assistance grants; beginning in 2012-13 this contribution was to increase by 1% for each of five consecutive years. The amount will be 1% in 2013-14. Note that allocations were adjusted in 2012-13 on a one-time basis to accommodate changes in federal Pell grant award guidelines.
2. BOR policy mandates that UH Hilo must allocate 60% of tuition-generated aid as need-based financial assistance. For 2010-11, the actual allocation was approximately 65%. This increased to 67% in 2011-12, and then to 70% in 2012-13, and has remained level since.
3. The number of Chancellor’s Scholars funded from this source was reduced in 2011-12 from 56 to 48, or 12 Scholars per cohort, and funding support temporarily shifted to Foundation dollars. Funding levels are being restored for 2012-13, adjusted for resident tuition increases.
4. Starting in 2011-12, this pool combined what were formerly separate allocations to CAFNRM, CAS, CoBE & Ka Haka ‘Ula; the pool is further distributed on the basis of prior Fall’s major headcount. Colleges will determine merit-based criteria & Financial Aid Office will distribute and track scholarship awards in a centralized manner in accordance with federal financial aid policies. **Note that starting in 2012-13, funds not awarded/distributed by January 15th will automatically be redistributed by Financial Aid Office as need-based aid.**
5. This line combined amounts from Financial Aid Office, Admissions Office, and international student scholarships starting in 2011-12; these amounts were reduced in 2011-12 to allow for the increased allocation to CoP. The 2012-13 allocation restored the funding levels as follows: Admissions Office ($10,000), International student scholarships ($78,000), and approximately $32,000 in various campus-wide scholarships which are administered centrally through the Financial Aid Office, some of which UH Hilo is contractually obligated to provide, e.g., Fun Factory. Note that Division of Student Affairs will work collaboratively with academic colleges as appropriate in awarding these funds.
6. Beginning with 2013-14, a decision was made to redirect funds from international exchange scholarships into a central pool to support all international students, with discretion to allocate scholarship funds as needed to reflect institutional priorities; the $78K allocated to international students included in the Division of Student Affairs allocation was also moved to this line as of 2013-14. Going forward, the amount of exchange scholarships from this funding source will be capped at the 2012-13 level, and new funds will support degree-seeking international students.
7. The amount for global exchange students was reassigned to a different funding source in 2011-12 to allow for the increased allocation to CoP; it was restored in 2012-13 to its 2010-11 level of funding, minus $10,000, which was moved to international student scholars. See also footnote six above.

Drafted 10/25/2012; Updated 02/15/2013; Finalised & endorsed by Financial Aid & Scholarship Committee 04/2/2013; Revised 04/11/2013 per Chancellor’s review

**Approved** Disapproved

Luofo Hong, Vice Chancellor for Strategic Planning
Donald O. Shaney, Chancellor

April 11, 2013
Date

University of Hawai‘i at Hilo
| College of Agriculture       | 191  | 0.053 | 5   | 10,465.80 |
| Col of Business & Economics | 358  | 0.099 | 10  | 20,931.60 |
| College of Arts & Sciences  | 2,859| 0.794 | 80  | 167,452.80|
| Ka Haka Ula O Keelikolani   | 193  | 0.054 | 5   | 10,465.80 |
| Total                       | 3,601|       |     | 209,316.00|

Compiled Apr-2-2013 by Mason Kuo
June 10, 2013

MEMORANDUM

To: Jason Cifra, Hawaii CC
   Katy Ho-Middleton, Honolulu CC
   Mona Lee, Kapiolani CC
   Earl Nishiguchi, Kauai CC
   Chris Manaseri, Leeward CC
   Alvin Tagomori, Maui CC
   Ardise Eschenberg, Windward CC
   Luoluo Hong, UH Hilo
   Francisco Hernandez, UH Manoa
   Jan Javinar, UH West Oahu

From: Lui Hokoana
   Associate Vice President for Student Affairs
   University of Hawaii System

Re: Second Century Scholars Program

The total funding for the 2013-14 Second Century Program Scholarships is $1,400,000. Attached is the apportionment, intent of scholarship, and criteria for awarding. This allocation is based on Hawaiian or part-Hawaiian students enrolled at the home campus and had an EFC (estimated family contribution) of less than 4996 for academic year 2012-2013.

Beginning the 2012-13 academic year your Chancellor has agreed to provide the funding for the Second Century Scholars Program. The intent of the program was to expand scholarship opportunities to Native Hawaiian students, which is in alignment with the University of Hawai‘i strategic plan.

Thank you for your cooperation in administering this scholarship program. Should you have any questions, please feel free to call Gregg Yoshimura at (808) 956-9432 or email at greggy@hawaii.edu.
### Purpose of the Scholarship:

A. To increase the amount of gift aid to each Native Hawaiian student who demonstrates financial need; and

B. To increase the number of Native Hawaiian students who receive gift aid in order to increase access to higher education opportunities.

C. To supplement the current UH financial assistance programs in order to decrease the loan amount per Native Hawaiian student.

### I. Criteria

**a. Native Hawaiian Ancestry, self declaration on admissions application (using ethnicity and/or legacy codes)**

   i. Priority to residents of Hawaii

**b. Demonstrated financial need. Completion of the FAFSA required. If selected for verification, student must submit additional documents and complete the verification process.**

**c. Must be a classified Undergraduate, Graduate or Professional student**

**d. Priority for students who are enrolled half-time or greater**

### II. Award Amount

**a. Award amounts are based on financial need**

**b. Award amounts are to be adjusted/reduced as outside aid is applied**

**c. Maximum award amount is set by the Office of the Vice President of Student Affairs**

   i. Maximum award is $8000.00.

### III. Funding

**a. Office of the Vice President of Student Affairs to determine fund allocations for each UH campus.**

Allocation calculation will take into consideration:

   i. Native Hawaiian Headcount

   ii. Pell eligible EFC

   iii. Cost of 12 credits of UG Resident tuition

Calculation of Allocation

Column A - selection based upon:

1) AY 2012-13 data

2) Ethnicity = 'HW' or Legacy = 'H'

3) Primary Campus and Registered at least 1 cr.

4) AY 2012-13 EFC < 4996 (Exceptional financial need)

Column B - Full-time Tuition: Fall 2013

<table>
<thead>
<tr>
<th>Campus</th>
<th>Per Cr</th>
<th>Full-time (12 cr)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UHM</td>
<td>381</td>
<td>4572</td>
</tr>
<tr>
<td>UHH</td>
<td>258</td>
<td>3096</td>
</tr>
<tr>
<td>UHWO</td>
<td>254</td>
<td>3048</td>
</tr>
<tr>
<td>CC</td>
<td>106</td>
<td>1272</td>
</tr>
</tbody>
</table>

5/10/2013
MEMORANDUM

TO: Chancellors

FROM: Linda K. Johnsrud
Executive Vice President for Academic Affairs/Provost

SUBJECT: Implementation of the New Board Exemption to Non-Resident Tuition

A new exemption for non-resident students with “special talents and/or unique skills that will make a significant contribution to campus life” was approved by the Board at the May 16, 2013 meeting. Chancellors may opt to award these exemptions.

According to updated BOR Policy Chapter 6-8(c), the total number of exemptions granted in any given academic year shall:

- be established in accordance with the campus’s strategic enrollment management goals;
- not impede access to higher education for resident students;
- not exceed 2 percent of campus enrollment in any given academic year;
- be reviewed on a biennial basis.


Residency code “Z” — Non Res Exempt – Spc Talent has been established in Banner SIS to implement this exemption effective with the Fall 2013 term. To assist with the implementation of this new non-resident tuition differential, the following guidelines have been established:

- Chancellors (or their designees) are responsible for identifying students and monitoring use of these exemptions each academic year. If a student is no longer eligible for the exemption or the exemption is withdrawn, campuses are responsible for replacing the "Z" residency code with the appropriate residency code.
- Chancellors shall determine whether and under what conditions exemptions, once awarded, may be withdrawn.
- A student awarded this exemption will be charged the resident rate at each University of Hawai‘i campus he or she is enrolled at during an academic year.
- The resident rate applies throughout the full academic year (fall, spring, and summer).
- The 2 percent exemption cap shall be based on a campus’ total headcount enrollment from the previous fall semester.
- The Institutional Research and Analysis Office will produce an annual report on exemptions awarded which will be sent to campuses to review and complete.

Should you have any questions, please contact Sandra Furuto at 956-7487 or yano@hawaii.edu.

c: Chief Student Affairs Officers
Chief Academic Affairs Officers
Vice Chancellors of Administration
Sandra Furuto, Director, Data Governance and Operations
Pursuant to recently revised BOR Policies, which by intent were designed for the purpose of assisting intercollegiate athletic programs at the University of Hawai‘i, Chapter 6, Section 6-8, Board Exemptions to Non-Resident Tuition (see [http://www.hawaii.edu/offices/bor/policy/borpch6.pdf](http://www.hawaii.edu/offices/bor/policy/borpch6.pdf)), which states in part (c) that:

> With the written approval of the Chancellor, campuses may, for those nonresident students whose special talents and/or unique skills will make a significant contribution to campus life, exempt the nonresident portion of tuition. If instituted, the total number of exemptions granted in any given year should be established in accordance with the campus’s strategic enrollment management goals, not impede access to higher education for resident students, not exceed two percent of campus enrollment in any given year, and be reviewed/promulgated on a biennial basis.

The following criterion has been developed at the University of Hawai‘i at Hilo to award the initial exemptions on our campus.

**Criteria for Awarding of Non-Resident Tuition Exemptions**

For the purposes of implementation, the Office of Intercollegiate Athletics has established the following eligibility criteria for initial award and subsequent renewal of a non-resident tuition exemption to student-athletes:

- **Student-athlete will demonstrate high athletic ability based on statistical and observational evidence;**
- **Student-athlete will demonstrate potential to contribute positively to a Division II sports program in support of the “Life in the Balance” mission and enhance the UH Hilo student community and local community beyond**
- **Student-athlete will maintain good academic standing, defined as consistent with NCAA initial eligibility standards if the athlete is a first-time freshman, which are an SAT score of 820 (or an ACT sum score of 68) along with a minimum high school GPA of 2.00 (see [http://fs.ncaa.org/Docs/eligibility_center/Quick_Reference_Sheet.pdf](http://fs.ncaa.org/Docs/eligibility_center/Quick_Reference_Sheet.pdf)), and defined as a 2.5 college GPA or higher if the athlete is a transfer or continuing student;**
- **The student-athlete will maintain satisfactory progress to degree as defined by the NCAA and by UH Hilo; and**
- **Student-athlete would not otherwise attend UH Hilo unless granted an exemption. In addition, we have made a commitment to prioritize awarding of non-resident tuition exemptions for those sports programs with a demonstrated capacity to generate revenue. Finally, exemptions will also be awarded in a manner which ensures UH Hilo’s compliance with Title IX.**

**Process for Awarding of Non-Resident Tuition Exemptions**

The Office of Intercollegiate Athletics has developed the following procedures for determination of exemption recipients and implementation of those exemptions:

- **Step 1**: Head coaches will submit appropriate documentation on behalf of all potential student-athlete awardees prior to established deadlines; documentation at a minimum will include all qualifying NCAA and institutionally mandated eligibility documents.
- **Step 2**: Head coaches will prioritize multiple applicants based upon award criteria listed above.
- **Step 3**: Head coaches will recommend priority approval to Director of Athletics.
- **Step 4**: The Director of Athletics will select the appropriate number of approved exemptions based on established UH Hilo criteria and BOR policy definitions.
- **Step 5**: The Director of Athletics will forward the list of recommended students in prioritized rank order (to include primary and alternate candidates) to receive non-resident tuition exemptions to the Director of Financial Aid.
- **Step 6**: The Director of Financial Aid will review for financial aid implications and apply the exemptions as appropriate.
- **Step 7**: If a recommended student-athlete is not deemed eligible to receive an exemption, or a student offered an exemption declines the offer, the next student-athlete on the prioritized list of alternate candidates.
- **Step 8**: At the end of each semester, the Director of Athletics will prepare and submit a report regarding progress and performance by student-athletes receiving the exemption to the Chancellor for Student Affairs and the Director of Financial Aid.