FINANCIAL AID & SCHOLARSHIP ADVISORY COMMITTEE
Meeting Minutes

Monday, March 17th, 2014 | 2:00 – 4:00 PM
Large Multipurpose Room, West Wing, Student Services Center

Present:
Susan Brown (CAS), Krishna Dhir (CoBE), Karla Hayashi (Academic Affairs), Luoluo Hong (VCSA/convener), Keiki Kawai‘ae‘a (CHL - late), Jim Mellon (ISS), Randy Hirokawa (for VCAA), Natalie Savona (UHHSA), Mike Shintaku (CAFNRM - left early), Bruce Matthews (for CAFNRM)

Absent:
Len Woods (UB), TBD (CoP)

I. INFORMATION: With Dexter Irvin’s departure from UH Hilo on December 31st, Tim Moore has been appointed interim Athletic Director; in that capacity, he joins this committee as its newest member.

II. DISCUSSION/RECOMMENDATION: Proposal from UH Manoa to change tuition policy so that Pacific Islander students who come from a country that does not have a baccalaureate granting institution of higher education would be eligible for resident tuition – please refer to the top of page 11 of the following BOR policy chapter: http://www.hawaii.edu/offices/bor/policy/borpch6.pdf
   a. Please refer to attachment A for background on proposal (March 2, 2014 email to Chancellor)
   b. Please refer to attachment B for info on financial impact (March 8, 2014 email to Chancellor)
   c. Discussion points:
      i. Some on the Council of VC’s raised the question why Pacific Islander students would be eligible for resident tuition versus other student populations; it was noted the undocumented students are now eligible for resident tuition by BOR policy
      ii. Given our past practice, it appears that we have nothing to lose by endorsing this proposed change, especially as it is consistent with our history of commitment to access for PI students
   d. The Committee expressed endorsement for this proposed policy change by a vote of 8-0-0 (CHL, CoP and UB representatives not present
III. **DISCUSSION/RECOMMENDATION:** Review of proposed tuition assistance allocation for academic year 2014-15 – please refer to attachment C

a. As in the past, the Director of Financial Aid provides a rough draft estimate of projected tuition assistance allocation (which will be 18% of tuition revenue collected in 2013-14), accounts for mandatory commitments first, e.g., need-based aid at 70%, merit-based programs with external mandates, etc., and then distributes remaining funds to the discretionary merit-based programs

b. This draft proposal does not account for:
   i. A change in the tuition policy for Pacific Islanders (which would free up approximately $725,000 for reallocation); or
   ii. Inclusion of funding for Second Century scholarships (approximately $180,000) – it was noted that funding support for this could be supported by some of the redirected $725,000 from above, assuming that this policy proposal is approved by the BOR; otherwise, implementation may have to be phased in over a multi-year period

c. Merit-based programs essentially would each receive an across-the-board increase of 5%
   i. Before merit-based aid allocations will be released for AY 2014-15, units/colleges need to submit a report documenting use/impact of funds disbursed in 2013-14
   ii. In addition, units/college disbursing merit aid programs will need to share their selection process/criteria with this committee prior to awarding funds
   iii. VCSA will ask Institutional Analyst to prepare headcount formula for distribution of the college-based merit pool then prepare final distribution communication to all units/colleges

d. Amounts of unexpended funds from each merit-based programs were shared;
   i. Overall, VCSA noted an overall improvement in the capacity to award dollars to students, with a notable gain by CAS
   ii. All funds not expended by January 15th, as noted in last year’s tuition assistance allocation, were returned to the Financial Aid Office and disbursed, and this practice will be continued next year

e. Of the approximately $155,000 still available for discretionary allocation, it was proposed that the amounts be distributed as follows:
   i. $75,000 to increase the allocation for Office of Intercollegiate Athletics (primarily to support recruitment of first-year student-athletes)
   ii. $55,000 to continue support for the recruitment and retention of degree-seeking international students
   iii. $25,000 for a pilot program to provide nominal scholarship awards to students who experience an anomalous semester of poor academic performance to incentivize them to bring their GPA back up, e.g., $250 if they get a 2.0, $500 if they get a 3.0 (this is being piloted in CAS but
members saw merit to extend the pilot to students in all colleges)

f. In vote of 9-0-0, this proposal with noted changes was endorsed by this Committee (CoP and UB representatives not present)

IV. INFORMATION: Interim Director of Financial Aid Lynette Egusa provided written highlights on financial aid applications received/process, type/amount of financial aid awarded, and how Second Century Scholarships were awarded in FY 2013-14 – please refer to attachment D

V. INFORMATION: Reports on scholarship awarding processes for 2013-14, i.e., what were the goals, how did the unit accomplish these goals, was the desired impact achieved, etc.

a. College of Arts & Sciences shared their report – see attachment E
   i. Primary lesson learned? That the student receives a scholarship has more impact than how much they receive!
   ii. CAS will follow up with Performing Arts and Marine Sciences to solicit proposals for non-resident tuition exemption awards

b. Global & Intercultural Education shared their report – see attachment F
   i. Two efforts were underway this past year: (a) to rebalance the amount of scholarship awards more to degree-seeking international students (versus global exchange students), and (b) to provide assistance to new incoming international students (versus only continuing students), and both were achieved but need to be continued; several process improvements were also shared
   ii. A request to utilize up to 3 non-resident tuition exemptions, and no more than a total of 10 exemptions to support international students in any given year was proposed and endorsed by the committee by a vote of 7-0-2 (CoP and UB representatives not present)

c. College of Agriculture, Forestry & Natural Resource Management did not share a report, but did share a draft for revamping their selection criteria for merit awards in their college; it was reiterated that the decision on this lies with the college

Respectfully submitted by Luoluo Hong
Hi Don,

Back before 2007-08, Pacific Islander students were extended resident tuition rates to attend UH Hilo. In 2007-08, that privilege was revoked by the BOR at the behest of then System officers President McClain and VP Linda Johnsrud. Many UH Hilo staff/faculty testified against that change and ended up getting politically burned. The change went through, and we have what is our current policy: PI students are charged 150% tuition, and then UH Hilo, of its own initiative, has been granting opportunity scholarships to PI students to make up the 50% difference. It has been a long-standing tradition for our campus to ensure access to those PI students who cannot attend a 4-year institution in their own country.

UH Manoa is now considering a proposal to ask that UH System policy return to its pre-2007 status, that is, PI students would once again receive resident tuition status. The SSAO’s have been charged to consult with their chancellors to determine their thoughts on this.

For the relevant BOR policy language, please refer to the top of page 11 of the following:

You would need to know that for UH Hilo, given our current practice, there would be a net impact of 0 since we already subsidize PI students’ tuition rates. However, if this policy were to be changed, while the total cost would be the same, we would be able to redirect the tuition assistance dollars now going to PI students to other needy students (largely Hawaii residents) instead to ameliorate the costs of their education. However, PI students would only be charged resident tuition so we do not gain or lose in total revenue. Hope this makes sense.

Please advise: does UH Hilo wish to support a proposal to change the current BOR policy such that PI students would receive resident tuition status?

Thanks,
Luo2

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Luoluo Hong, PhD, MPH, Vice Chancellor for Student Affairs | seeking edVentures
UNIVERSITY OF HAWAI`I AT HILO | Phone: (808) 932-7445 | Email: luoluo@hawaii.edu
URL: http://hilo.hawaii.edu/vcsa | Facebook: http://facebook.com/UH.Hilo.VCSA

“Education is the most powerful weapon which you can use to change the world.” — Nelson Mandela
Hi there,

As a reminder, the proposed policy change would result in Pacific Islander students from eligible countries being assessed resident tuition. Our current practice is to assess Pacific Islander students 150% of resident tuition, but then we award a need-based scholarship to cover the difference between the resident tuition rate and the 150% rate.

Please review the following below for the above request – you will need to “track” the years carefully, please:

- The 2013-14 tuition assistance allocation is determined on the basis of the tuition revenue collected in 2012-13.
- In 2012-13, what we actually collected in tuition revenue was $33,617,647. This meant that we had $5,715,000 available to award as tuition assistance in 2013-14 (i.e., 17% of all revenue assessed).
- If PI students were only assessed resident tuition in 2012-13, then the total tuition revenue collected (based on 206 PI students enrolled that year) would have been reduced by $605,640. So instead of collecting $33,617,647 in tuition we would only have received $33,012,007.
- If PI student were only assessed resident tuition in 2012-13, then the available tuition assistance dollars for 2013-14 would have been only $5,612,041 – again, 17% of all revenue assessed in 2012-13. This would have meant a reduction of $102,959 to the total amount available to distribute as aid in 2013-14, or a reduction of 1.8%.
- In 2013-14, we anticipate awarding $663,468 in tuition assistance dollars as grants-in-aid to PI students by end of Summer Session; this means if the policy were changed and no scholarships were awarded to PI students in 2013-14, then $560,509 would become available to award to other needy Hawaii resident students ($663,468 freed up minus the reduction to the total TA allocation of $102,959).
- We anticipate that the infusion of more grants-in-aid to Hawaii residents would boost their new and continuing enrollment, but cannot estimate the actual effect on tuition revenue increases given the lack of data on tuition elasticity. One could also argue that a change to our PI student tuition policy if publicized broadly might attract more applicants, even though current PI students for all intents and purposes are only paying resident tuition, but again we cannot state this affirmatively.

Please advise if you need additional info. I would like to thank Lynette Egusa, Acting Director of Financial Aid Office, for her assistance/consultation in providing this data.

Best,

Luo2

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Luoluo Hong, PhD, MPH, Vice Chancellor for Student Affairs | seeking edVentures
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URL: http://hilo.hawaii.edu/vcsa | Facebook: http://facebook.com/UH.Hilo.VCSA

“Education is the most powerful weapon which you can use to change the world.” — Nelson Mandela
### UH Hilo Financial Assistance

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<td>• $180,000 for students of Hawaiian Ancestry; $125,000 for resident/graduate/prof students in FY 14</td>
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<td>Pacific Islander Scholarship</td>
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<td>$650,000.00</td>
<td>$831,000.00</td>
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<td>• undergraduate, graduate &amp; professional students are eligible if meet criteria</td>
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<td>Sub-total for Need-Based</td>
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<td>$2,505,608.00</td>
<td>$2,819,025.00</td>
<td>$3,640,000.00</td>
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### Achievement Based - allowable as 30% maximum of financial assistance allocation

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<td>Chancellor's Scholars</td>
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<td>Academic Colleges - central merit pool</td>
<td>$161,500.00</td>
<td>$191,000.00</td>
<td>$203,220.00</td>
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<td>$75,000.00</td>
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<td>$11,000.00</td>
<td>-</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>0.00</td>
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<td>International Student Scholars</td>
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<td>$69,000.00</td>
<td>-</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
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<td>$110,000.00</td>
<td>-</td>
<td>$100,000.00</td>
<td>$103,000.00</td>
<td>$108,150.00</td>
<td>5.00%</td>
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<td>New initiative???</td>
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<td>$55,193.00</td>
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<td>Sub-total for Achievement-Based</td>
<td>$1,123,956.00</td>
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<td>$1,560,020.00</td>
<td>$1,650,020.00</td>
<td>$1,905,000.00</td>
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<td>GRAND TOTAL</td>
<td>$3,070,000.00</td>
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<td>$4,207,500.00</td>
<td>$5,200,020.00</td>
<td>$5,715,000.00</td>
<td>$6,350,000.00</td>
<td>11.2%</td>
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ENDNOTES:

1. Per UH System policy, 15% of tuition revenue from prior year must be allocated to financial assistance grants; in 2012-13 the contribution increased to 16%; in 2013-2014 it was increased to 18%. Adjustments were required 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 will be 70% in 2012-13, 2013-14, and 2014-15.

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. Funding for 2014-15 is based on 48 returning plus 20 new.

4. Starting in 2011-12, this pool combines what were formerly separate allocations to CAFNR, 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 funds not awarded/dischursed 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 scholars starting in 2011-12; these amounts were reduced in 2011-12 to allow for the increased allocation to CoP. The 2012-13 allocation restores the funding levels. This includes amounts for: Admissions Office ($10,000), international student scholars ($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 prvide, e.g., Fun Factory. Note that Division of Student Affairs will work collaboratively with academic colleges as appropriate in awarding these funds.
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 is being restored in 2012-13 to its 2010-11 level of funding, minus $10,000, which will be moved to international student scholars.

Approved / Disapproved:

Luoluo Hong, Vice Chancellor for Student Affairs

Donald O. Straney, Chancellor
Financial Aid Update  
March 2014

Financial Aid Applications received:

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<th>End of February</th>
<th>Change</th>
<th>Year Total</th>
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<td>6826</td>
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<td>1112</td>
<td>7328</td>
<td>+502 +7%</td>
<td>7396</td>
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<tr>
<td>1213</td>
<td>8231</td>
<td>+903 +12%</td>
<td>8313</td>
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<td>1314</td>
<td>8061</td>
<td>-170 -2%</td>
<td>8063 (still processing)</td>
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<td>1415</td>
<td>4157</td>
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Financial Aid Awards made as of February:

- 1213 4047
- 1314 3927 -120 -2% (continuing to award)
- 1415 1253

Federal Pell Grant:

Number Awarded: 1803  Total: $7,308,319

Federal Work Study: (Student must work to earn)

Number of student paid: 173  Earned: $210,815.81 (as of January 31, 2014)

UH System/UH Hilo Common Scholarship Application: (Deadline March 1)

Number of applications submitted: 1314 = 232
1415 = 602 (159% increase)

Second Century Scholarship:

The intent of the program is to expand scholarship opportunities to Native Hawaiian students. The 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.

The allocation for the 2013-14 year is $179,200.

The following is data based on recipients for the 2013-2014 academic year.
Total recipients = 60 (Freshman = 11, Sophomore = 13, Junior = 16, Senior=20)
Recipients by College:
College of Arts & Sciences = 49
College of Business and Economics = 5
College of Agriculture, Forestry, and Natural Resource Management = 2
Ka Haka ‘Ula O Ke‘elikolani, College of Hawaiian Language = 4
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<td>$7,429,680.00</td>
<td>$7,479,241.00</td>
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<td>$4,397,870.00</td>
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<td>$3,810,810.00</td>
<td>$3,747,812.00</td>
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<td>$2,835,800.00</td>
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<td>$360,565.00</td>
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<td>$329,873.00</td>
<td>$380,998.00</td>
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<td>$14,954,168.00</td>
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<td>$7,275,046.00</td>
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<td>$176,825.00</td>
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<td>$2,859,769.00</td>
<td>$2,470,873.00</td>
<td>$261,740.00</td>
<td>$354,714.00</td>
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<td>$124,614.00</td>
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<td>$354,714.00</td>
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<td>$474,825.00</td>
<td>$394,714.00</td>
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<td>$46,671,362.00</td>
<td>$46,797,322.00</td>
<td>$44,471,489.00</td>
<td>$42,024,149.00</td>
<td>$36,463,264.00</td>
<td>$27,689,275.00</td>
<td>$21,632,480.00</td>
<td>$17,239,987.00</td>
<td>$15,216,349.00</td>
<td>$14,966,921.00</td>
<td>$13,169,988.00</td>
<td>$10,860,089.00</td>
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<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>
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</tr>
<tr>
<td>Awarded &amp; Canceled</td>
<td>$25,865,624.00</td>
<td>$26,524,135.00</td>
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<td>13%</td>
<td>12%</td>
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<td>8%</td>
<td>7%</td>
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<tr>
<td>Default Rate - 2 yr rate (will no longer be published)</td>
<td>6.30%</td>
<td>4.80%</td>
<td>5.50%</td>
<td>5.60%</td>
<td>5.10%</td>
<td>3.20%</td>
<td>2.80%</td>
<td>4.60%</td>
<td>4.20%</td>
<td>4.30%</td>
<td>6.80%</td>
<td>6.00%</td>
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<td>367</td>
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<tr>
<td>Default Rate - 3 yr rate</td>
<td>9.50%</td>
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<td>Staff Members</td>
<td>(1 casual hire as of 11/5/13)</td>
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</table>
Outcomes of scholarships issued from CAS Dean’s office for 2012/2013 Academic Year

**Regular CAS scholarship: 62 given out for a least one semester**

**Percent graduated or retained in CAS: 95%**

**Percent transferred: 3%**

**Percent not retained anywhere: 2%**

Graduated: 13 students

Still enrolled: 46 of these 46, 8 plan to graduate F 13 and 16 Sp 14

Transferred colleges within UH Hilo: 1

Transferred to UH Manoa: 1

Complete withdrawal for Fall 2013: 1

**What are they doing Fall 2013**

Study Abroad: 3 students

Enrolled for:

- 3 credits 2
- 6 credits 1
- 8 credits 1
- 9 credits 1
- 12 credits 9
- 13 credits 7
- 14 credits 5
- 15 credits 5
- 16 credits 2
- 17 credits 4
- 18 credits 5
- 21 credits 1
Scholarships from particular majors:

Art: 2 recipients
  Graduated: 1
  Enrolled and graduate Sp 14: 1

Performing Arts: 15 scholarship recipients
  Graduated: 3
  Still enrolled: 8 (one Study abroad and 2 graduate F 13)
  Transferred (London): 1
  Not retained (not registered Fall 2013): 3

Biology (Don Hemmes): 1 recipient
  Still enrolled

Poly Sci:  2 awards
  Transferred: 1
  Not retained: 1

Incentive Scholarships: 27 recipients of a small incentive after a W1

Percent graduated or retained at CAS: 85%
Percent transferred: 7.4%
Percent no retained: 7.4%

Graduated: 3
Still enrolled: 20 (2 graduate F 13; 3 graduate S 14)
Transfer to a different college at UH Hilo: 1
Transfer to UH Manoa: 1
Not enrolled or complete withdrawal: 2
International Student Scholarships
Report for 2013-2014

Amount Allocated: $181,000

Amount Awarded: $163,100*

- Degree-seeking students:
  - New (recruitment): $11,500
  - Continuing (retention): $62,000
    - Total: $73,500

- Exchange students:
  - 1-2 semester visiting students: $78,500
  - Degree-seeking international students who assist with orientation and other duties: $11,100
    - Total: $89,600

* This amount may increase, depending on whether two new students who have been offered a scholarship for the Spring 2014 semester choose to accept it, and whether two other continuing students achieve the minimum GPA required at the end of the Fall 2013 semester.

Balance: The unspent balance (approximately $10,000-$17,000) will be given back to the Financial Aid Office to award to financially needy students as soon as awards for Spring 2014 are finalized.

Goals:
- For the first time, some scholarship funds were used as a tool to recruit students and encourage/enable them to enroll at UH Hilo. The goal was to award scholarships to 6 new students who would not otherwise choose to attend UH Hilo without the scholarship for the 2013-2014 year. A total of four students accepted the scholarship and enrolled at UH Hilo. Several other outstanding students were offered a scholarship but chose not to accept it and enrolled at other institutions.

- Other scholarships were used as a tool to retain and reward academically outstanding degree-seeking students; to attract and enroll exchange students (who generated approximately $700,000 in tuition revenue each year); to fulfill international exchange agreement requirements; and compensate international students who assist with orientation and other duties.

What Worked:
- It is a step in the right direction to hold steady scholarship funds for visiting exchange students while increasing the funds for degree-seeking students.
We were able to enroll some degree-seeking students who would not have otherwise come to UH Hilo without a scholarship offer.

What Needs to be Improved/Addressed:

- Scholarship offers must be made early; waiting until April is already getting late. We started the process for the Fall 2013 late due to final allocations not being approved until April.
- May need to consider increasing the amount of the scholarship and/or be able to award students with a non-resident tuition exemption to be able to attract the most outstanding applicants.
- The offer/awarding process needs to be more proactive and integrated into the international recruitment plan. Rather than offering scholarships to individuals who apply for admission, additional approaches such as attracting and encouraging individuals to apply for admission by publicizing/informing them of scholarship possibilities need to be undertaken. This is challenging though, with very little to no on-site international recruitment.
- Another related challenge is that some students will not even apply for admission unless they know they have a chance at getting a scholarship, but without any evidence of previous academic achievement (which is supplied with the application for admission), it is difficult to be able to give a potential applicant an indication of whether or not they have a good chance at being awarded a scholarship.
- Admissions Office staff who process applications from international students need to be more helpful and timely in identifying potential scholarship recipients.
Proposal to Allocate Non-Resident Tuition Exemptions
to International Students

Proposal
Beginning in 2014-2015, utilize up to three non-resident tuition exemptions for international degree-seeking students who demonstrate outstanding academic achievement and the potential to make a significant contribution to campus life.

Background
The recently revised BOR policies (Chapter 6, Section 6-8, Board Exemptions to Non-Resident Tuition) enable a UH campus to award approximately 80 exemptions to UH Hilo students:

With the written approval of the Chancellor, campuses may, for those non-resident students whose special talents and/or unique skills will make a significant contribution to campus life, exempt the non-resident 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.

Goals
• Attract and enroll outstanding international degree-seeking students who would not otherwise choose to enroll at UH Hilo without the exemption.
• Build and enhance a greater awareness internationally of UH Hilo and attract and enroll more full-paying international non-resident students.
• Become more competitive in an increasingly competitive national and international market for international students.
• Contribute to the University’s Strategic Plan, Goal 4 ("Cultivate, sustain and reflect a diverse, multicultural university that is rooted in the indigenous history of Hawai‘i"), and Priority Action 4.2 ("Promote multicultural fluency through learning, training, research, and exchange opportunities for students, faculty and staff to develop awareness and knowledge of self and of others, and skills for effective interaction, communication, leadership, and organizational change.")
• Support the institution’s strategic enrollment management plan, which in part seeks to enroll more international degree-seeking non-resident students.
• Increase the institution’s tuition revenue.

Rationale
In an increasingly competitive national and global market for international students, and with an increased reliance on tuition revenue to maintain standard
operations at the University, it is critical that UH Hilo take steps to attract and enroll more degree-seeking non-resident international students. Enrollment of international degree-seeking students has been declining since the mid-2000’s, in contrast to the rest of the nation which has experienced consistent growth. UH Hilo has not made consistent or sustained efforts at recruiting degree-seeking international students. This can be attributed at least in part to a lack of proactive international recruitment and a lack of incentives such as scholarships or tuition discounting that many other institutions offer to international students. UH Hilo cannot continue this approach and expect the number of international students to grow—or even remain constant.

Criteria for the Exemptions

- Degree-seeking international student on an F-1 student visa.
- Academic achievement, as evidenced by outstanding grades/marks, such as grade point average (3.75 or equivalent) standardized test scores (2100 SAT total, 30 ACT composite, and/or 100 iBT TOEFL or equivalent), and/or top 5% ranking in one’s class. Given the nature of different educational and grading systems around the world, there needs to be some flexibility in determining outstanding academic achievement.
- Other special talents and/or unique skills that an applicant possesses may also be taken into consideration.
- Evidence that the student would not otherwise choose to enroll at UH Hilo without the exemption.

Renewal

- Up to 4 years, provided the student maintains satisfactory academic progress.