

**Massachusetts Assistance Student Success
Program**

XI. Tuition Waivers

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BOARD OF HIGHER EDUCATION TUITION WAIVER PROGRAM GUIDELINES

PURPOSE:

A founding principle of the Tuition Waiver Policy adopted by the Board of Higher Education is the belief that the benefits of higher education must be available to all citizens. The Board of Higher Education has developed a system of financial aid policy designed to assure and maintain access to the Commonwealth's public colleges and universities. An underlying goal of the policy is that future public sector tuition increases be matched with a concomitant increase in the maximum award for the financially neediest students. Further, financial aid provides an important tool for improving student quality and collaborations that enhance the efficiency and effectiveness of the system.

The Tuition Waiver Program, originally developed in 1981 to offset tuition increases and declining federal dollars, is fundamentally designed to provide financial support to those individuals who would be denied the opportunity for higher education without such assistance. Over the years, tuition waivers have been utilized as supplemental scholarships in campus-based financial aid packaging strategies. Thus, they represent an important mechanism for campuses to assist needy students.

The Legislature, following the principles of the financial aid policy outlined in the Task Force Report on Financial Aid, mandated that a single Tuition Waiver Program be developed. The single Tuition Waiver Program consists of several components designed to ensure maximum access for Commonwealth residents and provide incentives for improving student quality and institutional collaboration as follows: need based waivers, categorical waivers, graduate tuition waivers, and additional categories of waivers as approved by the Board of Higher Education.

SECTION A. NEED BASED TUITION WAIVERS

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

Any state supported undergraduate degree or certificate program offered by an institution. Institutions are encouraged, where appropriate, to extend waiver eligibility to students enrolled in non-state supported degree or certificate programs. The institutional definition of "certificate" program shall apply.

ELIGIBLE STUDENT:

A student enrolled in an eligible program and meeting the following requirements:

- a) A permanent legal resident of Massachusetts for at least one year prior to the opening of the academic year and be a U.S. citizen or a non-citizen eligible under federal Title IV regulations.
- b) In compliance with applicable law regarding Selective Service Registration.
- c) Not in default of any federal student loans for attendance at any institution or owe a refund for any previous financial aid received.
- d) Evidences documented financial need as measured by a federally approved system of needs analysis.
- e) Enrolled for at least three undergraduate credits per semester in an eligible program.
- f) Maintaining satisfactory academic progress according to institutional standards developed for federal financial aid programs, with at least an annual review.
- g) Has not earned a baccalaureate or professional degree.
- h) Files a current year Free Application for Federal Student Aid (FAFSA)

INSTITUTIONAL ALLOCATION:

- a) **Base Allocation:** Each institution shall receive an allocation that is calculated using the same methodology as the Cash Grant. Allocations are determined by a formula which utilizes three-year enrollment and financial aid data. Institutions may petition the Commissioner for a base allocation adjustment due to extenuating circumstances. All petition approvals are at the sole discretion of the Commissioner.
- b) **Supplemental Allocation:** In recognition of the need to offset increased tuition costs, the Commissioner may provide a campus with a supplemental allocation. Requests for a supplemental allocation must be received by the Commissioner on or before October 1 of the academic year for which the allocation is requested. Any supplemental allocation granted

shall not exceed the established rate of increase in tuition for that academic year.

- c) **De-obligation/Reallocation:** On or before November 1 of each year, institutions needing additional waiver resources may request the Commissioner to reallocate the unused or uncommitted portions that are released by other institutions. Subject to the availability of de-obligated resources, the Commissioner may reallocate waiver resources on or before December 31.

DETERMINATION OF NEED:

All waivers must be made on the basis of demonstrated financial need.

- a) Students qualifying for a waiver must complete the institution's required application process for student financial aid.
- b) Students selected by the U.S. Department of Education for verification must complete all required documentation prior to receipt of a Tuition Waiver.

AWARD VALUE:

- a) An individual student waiver for an award period may not exceed the actual campus tuition charge for the award period.
- b) Tuition Waiver awards, in combination with other resources in the student's financial aid package, may not exceed the student's demonstrated financial need.
- c) Students qualifying for a Tuition Waiver may be granted partial or full waivers depending upon the institution's financial aid packaging policies.
- d) Tuition Waivers should generally be awarded during the financial aid process as a component of the student's financial aid package. Therefore, students should be notified of Tuition Waiver awards via the financial aid award letter.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each campus to furnish, annually by August 31, a report detailing the number and characteristics of Need Based Tuition Waiver recipients for the previous academic year.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be opened to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION B. CATEGORICAL TUITION WAIVERS

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education Section 5 of Chapter 15A of the General Laws.

ELIGIBLE COURSE:

Any state supported course offered by an institution at a public college or university toward an undergraduate degree program or certificate program. Institutions may include or exclude non-credit courses or short-term certificate programs from any or all categorical waivers. Institutions are encouraged to extend, where appropriate waiver eligibility to students enrolled in non-state supported courses and/or certificate programs.

ELIGIBLE STUDENT:

A student enrolled in an eligible course and meeting the following requirements:

- a) A permanent legal resident of Massachusetts for at least one year under the college's residency requirements.
- b) Not in default of any federal student loans for attendance at any institution or owe a refund for any previous financial aid received. An affidavit from the student certifying this requirement will be sufficient documentation for categorical waivers.
- c) A member of an eligible category as defined below.
 1. **Veteran:** As provided in M.G.L. Chapter 4, Section 7(43) including: Spanish War, World War I, World War II, Korean, Vietnam, Lebanese peace keeping force, Grenada rescue mission, the Panamanian intervention force, or the Persian Gulf.

For purposes of tuition waivers, the term "veteran" shall also include any individual who served in the army, navy, marine corps, coast guard or air force of the United States for not less than ninety days at least one of which was served in the theatre of operation for the Somalia mission known as "Operation Restore Hope" and whose last discharge or release was under honorable conditions.

2. **Native American:** As certified by the Bureau of Indian Affairs.
3. **Senior Citizen:** Persons over the age of 60.
4. **Armed Forces:** An active member of the Armed Forces (Army, Navy, Marine Corps, Air Force or Coast Guard) stationed and residing in Massachusetts.
5. **Client of the Massachusetts Rehabilitation Commission or Commission for the Blind:** As certified by the respective commission.
6. If it deems necessary, the institution, consistent with its mission and subject to the Board of Higher Education's approval as of September 1, 1991, may establish additional waivers for specific categories of students.

- d) In accordance with institutional requirements, each student must present documentation of Categorical waiver eligibility to the appropriate college officials.

INSTITUTIONAL LEVEL OF EXPENDITURE:

- a) An institution's level of expenditure is determined by the value of the total number of Tuition Waivers granted to students in specific categories.
- b) Consistent with the Board of Higher Education's Tuition Retention Guidelines, tuition revenues that would have resulted from students receiving legislatively mandated categorical tuition waivers shall be counted toward the amount of revenue retained in the Retained Revenue Account (Refer to Tuition Retention Regulations for further details).

DETERMINATION OF ELIGIBILITY:

Eligible students applying for a waiver under this section shall be eligible on a space available basis for a waiver of full or partial tuition charges, provided that the campus has appropriate documentation to substantiate the student's categorical eligibility. Space available shall be determined in accordance with the normal practices and procedures as published by each institution.

AWARD VALUE:

- a) Individual student awards for an award period may not exceed the actual campus tuition charges for the award period.
- b) If the student is the recipient of need-based student financial aid resources and categorical tuition waiver awards, the combination of resources in the student's financial aid package may not exceed the student's demonstrated financial need.
- c) If the student is the recipient of both a need-based tuition waiver and a categorical waiver, the total value of both waivers may not exceed the total cost of tuition.
- d) Students qualifying for a categorical tuition waiver may be granted full tuition waivers consistent with the institution's policies.
- e) Campus fees are not included in the waivers. Institutions may, but are not required to, waive specific fees for participants in various categorical waivers. If fees are waived, the campus should publicize the fees waived.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain adequate documentation of a student's categorical waiver eligibility.
- b) The Commissioner shall require each campus to furnish annually by August 31, a report detailing the number and characteristics of categorical tuition waiver recipients.

- c) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION C. GRADUATE STUDENT TUITION WAIVER

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institution of higher education under Section 5 of Chapter 15A of the General Laws, excluding Community Colleges.

ELIGIBLE PROGRAM:

Any graduate degree or post baccalaureate certificate program offered by an institution.

ELIGIBLE STUDENT:

A student enrolled in an eligible program and meeting the criteria established by the institution.

GRADUATE TUITION WAIVER PROGRAM:

Each institution granting full or partial tuition waivers under this category must file guidelines with the Board of Higher Education. Such Guidelines shall include but not be limited to the award value, criteria for determination of need, and eligibility criteria. Such Guidelines shall be filed with the Board of Higher Education annually on or before September 1 of each year.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each campus to furnish annually by August 31st a report detailing the number and characteristics of graduate tuition waiver recipients for the previous year.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION D. MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY – PREPAID TUITION PROGRAM WAIVERS

DEFINITIONS:

MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY:

Authority established pursuant to M.G.L. c. 15c.

PREPAID TUITION PROGRAM:

Program established by MEFA pursuant to M.G.L. c. 15c S 5(f 1/2).

ELIGIBLE INSTITUTION (PARTICIPATING PUBLIC INSTITUTION OF HIGHER EDUCATION):

Any institution within the system of public higher education under section 5 of Chapter 15A of the General Laws, that participates in the MEFA Prepaid Tuition Program.

ELIGIBLE STUDENT:

Any student admitted to a participating public institution of higher education that is an owner or a qualifying beneficiary of a MEFA Prepaid Tuition Program.

TUITION CREDITS:

The amount of tuition to be paid by MEFA to participating public institutions of higher education pursuant to the Prepaid Tuition Program.

PREPAID TUITION PROGRAM WAIVER:

Any participating public institution of higher education shall waive the amount of tuition that would otherwise be due from the eligible student if the tuition charged by the participating public institution exceeds the amount received as a tuition credit pursuant to the Prepaid Tuition Program for the year the tuition credit is redeemed, in direct proportion to the eligible student's participation in the Prepaid Tuition Program.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each participating public institution of higher education to furnish annually by August 31st a report detailing the amount of any Prepaid Tuition Waivers for the previous academic years.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution shall retain such records for a period of five years if approval received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION E. MASSTRANSFER TUITION WAIVER PROGRAM

DEFINITIONS:

ELIGIBLE INSTITUTION:

Any two-year or four-year institution within the system of public institutions of higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

Any state-supported undergraduate degree program offered by an institution. Institutions are encouraged, where appropriate, to extend waiver eligibility to students enrolled in non-state-supported degree programs.

ELIGIBLE STUDENT:

A student enrolled in a state college or University who has completed one of the following:

- An associate degree at a public community college approved under the *MassTransfer* program;
- *MassTransfer* Pathways 60-credit map; or
- An associate degree under an Additional Transfer Articulation Agreement program.

The student must maintain satisfactory academic progress according to institutional standards developed for academic programs with at least an annual review and meet the minimum required 3.0 Grade Point Average (GPA) for continued eligibility.

AWARD VALUE:

Eligible students under the *MassTransfer* Tuition Waiver Program will be entitled to a tuition waiver equal to 100 percent of the resident tuition rate at a state college or University for the two (2) years of matriculation which immediately follow their community college enrollment. The tuition waiver for the second year of matriculation is contingent upon the student maintaining a cumulative 3.0 grade point average for the first two semesters of enrollment at the state college or University.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Massachusetts Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each campus to furnish, annually by August 31, a report detailing the number and characteristics of *MassTransfer* Tuition Waiver recipients for the previous academic year.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be opened to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION F. PAUL TSONGAS SCHOLARSHIP PROGRAM

DEFINITIONS:

ELIGIBLE STUDENT:

Students who have graduated from high school within three years and who meet the one year residency requirement for tuition classification at the State Colleges and State Universities with a grade point average (G.P.A.) of 3.75 and Scholastic Aptitude Test (S.A.T.) Scores of at least 1200 (or the American College Testing [A.C.T.] equivalent) are eligible to apply to a State College or State University for the Paul Tsongas Scholarship Program. Students who have graduated from high school and who meet the one year residency requirement for tuition classification at the State Colleges and State Universities and who have pursued other endeavors for a minimum of five years are eligible to apply to a State College or State University for the Paul Tsongas Scholarship Program under the exceptional life experience category set forth in the Guidelines. Eligible students must also file a current year Free Application for Federal Student Aid (FAFSA).

STATE COLLEGE SCHOLARS PROGRAM:

A waiver by the Board of Higher Education and a waiver of mandatory fees by the eligible institution.

ELIGIBLE INSTITUTION:

The nine Massachusetts State Colleges and State Universities.

NUMBER OF WAIVERS:

Each State College or State University may provide five new Paul Tsongas Scholarship Program Tuition Waivers per academic year.

GUIDELINES:

The State Colleges and State Universities shall develop eligibility criteria and a method for selecting Paul Tsongas Scholarship Program recipients, which shall be filed with the Board of Higher Education upon adoption, and upon any amendments thereto.

CONTINUING ELIGIBILITY:

Recipients of the Paul Tsongas Scholarship Program Tuition Waivers shall maintain a G.P.A. of 3.3 for continued eligibility for the Paul Tsongas Scholarship Program Tuition Waiver for four years of study.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each State College or State University to maintain adequate documentation of a student's eligibility as a Paul Tsongas Scholarship Program recipient.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION G. WASHINGTON CENTER PROGRAM

DEFINITIONS:

ELIGIBLE STUDENT:

Resident student enrolled in a degree program at the University of Massachusetts or at a State College or State University who meets the following requirements:

- a) is enrolled in an eligible degree program as determined by the institution; and
- b) has obtained a minimum 3.0 cumulative grade point average; and
- c) meets other eligibility criteria as established by the institution and the Washington Center.
- d) Has filed a current year Free Application for Federal Student Aid (FAFSA)

ELIGIBLE INSTITUTION:

The nine Massachusetts State Colleges and Universities and the four undergraduate campuses of the University of Massachusetts.

AWARD VALUE:

A waiver of tuition by the Board of Higher Education, a waiver of regular mandatory fees by the eligible institution, and a housing scholarship provided by the Washington Center.

NUMBER OF AWARDS:

Each eligible institution may provide nine new Washington Campus Tuition Waivers per academic year; waivers not awarded by eligible institutions may be awarded by other institutions upon approval of the Board of Higher Education.

GUIDELINES:

Eligible institutions shall develop additional eligibility criteria and a method for selecting Washington Campus award recipients. Additional eligibility criteria shall be filed with the Board of Higher Education upon adoption and upon any amendments thereto.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain and provide, upon request, adequate documentation of a student's eligibility as a Washington Center Tuition Waiver recipient.
- b) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor, or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION H. UNIVERSITY OF MASSACHUSETTS ACADEMIC AND ARTISTIC TALENT PROGRAM

DEFINITIONS:

ELIGIBLE STUDENT:

Student enrolled in a degree program at the University of Massachusetts who meets the following requirements:

- a.) Eligibility criteria as established by the University of Massachusetts.

ELIGIBLE INSTITUTION:

The five campuses of the University of Massachusetts.

AWARD VALUE:

The University of Massachusetts is authorized to award up to \$1,025,000 in Academic and Artistic Talent Tuition Waivers annually.

GUIDELINES:

Campuses of the University of Massachusetts will submit to the University President waiver allocation requests and guidelines for eligibility and awarding of waivers by June 1 prior to the beginning of each academic year in which the waivers will be awarded. The University of Massachusetts Presidents Office will be responsible for allocation of waivers to campuses, ensuring compliance with eligibility standards and award procedures, and reporting to the Board of Higher Education, prior to September 1, information pertaining to the awarding of academic and artistic talent tuition waivers for the prior academic year.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain and provide, upon request, adequate documentation of a student's eligibility as an Academic or Artistic Talent Tuition Waiver recipient.
- b) It shall be the responsibility of the University of Massachusetts Presidents Office to ensure that campuses adhere to annual waiver allocations and to provide, upon request and as stipulated, adequate documentation of academic and artistic talent waivers awarded.
- c) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor, or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION I. UNIVERSITY OF MASSACHUSETTS EXCHANGE PROGRAM

DEFINITIONS:

ELIGIBLE STUDENT:

Student enrolled in a degree program at the University of Massachusetts who meets the following requirements:

- a) Eligibility criteria as established by the University of Massachusetts.

ELIGIBLE INSTITUTION:

The five campuses of the University of Massachusetts.

AWARD VALUE:

The University of Massachusetts is authorized to award up to \$650,000 in Exchange Program Tuition Waivers annually.

GUIDELINES:

Campuses of the University of Massachusetts will submit to the University President waiver allocation requests and guidelines for eligibility and awarding of waivers by June 1 prior to the beginning of each academic year in which the waivers will be awarded. The University of Massachusetts President's Office will be responsible for the allocation of waivers to campuses, ensuring compliance with eligibility standards and award procedures, and reporting to the Board of Higher Education, prior to September 1, information pertaining to the awarding of exchanging programs tuition waivers for the prior academic year.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain and provide, upon request, adequate documentation of a student's eligibility as an Exchange Program Tuition Waiver recipient.
- b) It shall be the responsibility of the University of Massachusetts President's Office to ensure that campuses adhere to annual waiver allocations and to provide, upon request and as stipulated, adequate documentation of exchange programs tuition waivers awarded.
- c) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor, or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION J. UNIVERSITY OF MASSACHUSETTS ATHLETIC PROGRAM

DEFINITIONS:

ELIGIBLE INSTITUTION:

The campuses of the University of Massachusetts.

ELIGIBLE STUDENT:

Student enrolled in a degree program at the University of Massachusetts who meets the following requirements:

- a) Academic and athletic eligibility criteria as established by the University of Massachusetts.

AWARD VALUE:

The University of Massachusetts is authorized up to \$1,500,000 in athletic program tuition waivers annually.

ALLOCATION OF AWARDS:

The University of Massachusetts President's Office shall determine the allocation of awards to campuses. By academic year 2003-2004, a minimum of \$750,000 (50 percent) of the value of the athletic program tuition waiver allocation (\$1,500,000) must be provided to Massachusetts' residents. Prior to academic year 2003-2004, the value of tuition waivers allocated to non-resident students may not exceed that amount allocated to non-resident students in academic year **2000-2001**.

Further, where the University has similar (same activity and gender participation) Division I sports at multiple campuses, tuition waivers may only be awarded to students participating in that program so designated as eligible by the University of Massachusetts President's Office and not to students in a similar Division 1 sport at another University of Massachusetts campus.

GUIDELINES:

Campuses of the University of Massachusetts will submit to the University President waiver allocation requests and guidelines for eligibility and awarding of waivers by June 1 prior to the beginning of each academic year in which the waivers will be awarded. The University of Massachusetts President's Office will be responsible for allocation of waivers to campuses, ensuring compliance with eligibility standards and award procedures, ensuring compliance with Title IX of the Education Amendments of 1972, and reporting annually to the Board of Higher Education, prior to September 1, information pertaining to the awarding of athletic programs tuition waivers for the prior academic year.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain and provide, upon request, adequate documentation of a student's eligibility as a tuition waiver recipient.
- b) It shall be the responsibility of the University of Massachusetts President's Office to ensure that campuses adhere to annual waiver allocations and to provide, upon request and as stipulated, adequate documentation of athletic programs tuition waivers awarded.
- c) All financial books, records and documents pertaining to this program shall be at all

reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor, or their authorized representatives who shall have access to the premises wherever such books, records or documents are located. The Institutions shall retain such financial books, records and documents for seven years. An Institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION K. COOPERATIVE ASSOCIATION OF STATES FOR SCHOLARSHIPS (CASS) PROGRAM

DEFINITIONS:

ELIGIBLE STUDENT:

A student enrolled in an eligible institution under the auspices of the Cooperative Association of States for Scholarships (CASS) program funded by the United States Agency for International Development. Students in this program shall be considered non-resident students.

ELIGIBLE INSTITUTION:

Berkshire Community College and other institutions as approved by the Board of Higher Education.

AWARD VALUE:

Each eligible institution is authorized to award up to \$250,000 in Cooperative Association of States for Scholarships (CASS) Program Tuition Waivers annually. Tuition waivers may be granted up to the full amount of non-resident tuition, or any portion thereof.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain and provide, upon request, adequate documentation of a student's eligibility as a Cooperative Association of States for Scholarships tuition waiver recipient.
- b) It shall be the responsibility of each institution to furnish annually by August 31 a report to the Commissioner detailing the number of Cooperative Association for Scholarships recipients for the previous academic year and the corresponding amount of tuition and fees waived.
- c) All financial books, records and documents pertaining to this program shall at all reasonable times be open to inspection, review and audit by the Commissioner, the State Auditor, or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION L. INCENTIVE PROGRAM FOR ASPIRING TEACHERS

DEFINITIONS:

ELIGIBLE INSTITUTION:

The nine Massachusetts State Universities and the four undergraduate campuses of the University of Massachusetts.

ELIGIBLE PROGRAM:

Any liberal arts or fine arts undergraduate baccalaureate degree program that has been approved by the Department of Education for certification and is in a field with teacher shortages.

ELIGIBLE STUDENT:

- a) Is in his/her third and/or fourth year enrolled in state approved teacher education programs in fields with teacher shortages.
- b) Has a cumulative 3.0 grade point average in general education courses.
- c) Commits to teaching for two years (one year for each year of full or partial tuition waiver received) in a public school in the Commonwealth upon successful completion of a bachelor's degree from the college or university and the appropriate certification pursuant to section 38G of Chapter 71 M.G.L.
- d) As determined by the institution.
- e) Is a United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis.
- f) Is in compliance with applicable law regarding Selective Service Registration.
- g) Is not in default of any federal or state student loans for attendance at any institution or owe a refund for any previous financial aid received.
- h) Has filed a current year Free Application for Federal Student Aid (FAFSA).

AWARD VALUE:

The Board of Higher Education is authorized to award up to \$500,000 in Aspiring Teachers tuition waivers annually. Students eligible for the Incentive Program for Aspiring Teachers will be entitled to a tuition waiver equal to the resident tuition rate at the state college or participating university campus at which they are enrolled for two (2) years. The tuition waiver for the second year of eligibility (senior year) is contingent upon the student earning a 3.0 grade point average in the third year. Students are required to complete an agreement regarding service and/or repayment (including interest).

AWARD PROCEDURE:

Persons who participate in the program but do not complete their college education within four years of entering the certification program or who fail to complete their two year teaching commitment within four years following graduation from college, shall be obligated to pay the Commonwealth the full amount of the tuition waivers granted through the Incentive Program for Aspiring Teachers, prorated according to the

fraction of the teaching not completed with interest, as determined by the Board of Higher Education.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each state college and university to maintain adequate documentation of a student's eligibility in the Incentive Program for Aspiring Teachers.
- b) The Commissioner shall require each campus to furnish at the end of each semester a report detailing the number of Incentive Program for Aspiring Teachers recipients for the previous semester, the corresponding amount of tuition waived, and copies of the student-signed agreements (promissory notes).
- c) All financial books, records and documents pertaining to this program shall at times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION M. COLLABORATIVE TEACHERS

DEFINITIONS:

ELIGIBLE INSTITUTION:

The nine Massachusetts State Universities and the four undergraduate campuses of the University of Massachusetts.

ELIGIBLE STUDENT:

Massachusetts public school (collaborative) teachers who mentor a student teacher from a state college or university in their classroom and who are not in default of any federal or state student loans or owe a refund for any previous financial aid received. An eligible student must be a public school teacher in the year he/she is using the award.

AWARD VALUE:

The Board of Higher Education is authorized to award up to \$200,000 in tuition waivers for state-supported graduate courses (in education or areas related to the teacher's subject matter) annually in support of collaborative teachers. Collaborative teachers shall be eligible for a tuition waiver for up to one state-supported graduate-level course for each student teacher mentored with a maximum of one student teacher per semester. Collaborative teachers can request waivers for up to two years after completion of the mentoring relationship for which eligibility is based. Individual student awards shall be no more than the resident graduate tuition rate at the participating institution.

AWARD PROCEDURE:

1. The collaborative teacher must request that the Superintendent/Principal indicate that he/she has successfully completed his/her responsibilities of mentoring a student teacher.
2. The collaborative teacher shall be responsible for submitting the required materials to the campus where he/she will enroll.
3. The campus shall notify the State Office of Student Financial Assistance of the collaborative teacher request for a tuition waiver.
4. The State Office of Student Financial Assistance shall allocate the tuition waiver to the campus, which in turn will award the tuition waiver to the eligible student.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the State Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each state college and university to maintain adequate documentation of a student's eligibility in the Program.
- b) The Commissioner shall require each campus to furnish annually by August 31 a report detailing the number of Collaborative Teacher recipients for the previous year and the corresponding amount of tuition waived.

c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records and documents for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION N. CAREER ADVANCEMENT PROGRAM (CAP)

DEFINITIONS:

ELIGIBLE INSTITUTION:

The nine Massachusetts State Universities and the four undergraduate campuses of the University of Massachusetts.

ELIGIBLE STUDENT:

Massachusetts public school teachers who have passed all three components of the Massachusetts Teachers Test and who are not in default of any federal or state student loans or owe a refund for any previous financial aid received. Eligibility is restricted to one state-supported graduate course tuition waiver for each of the first three years of teaching. An eligible student must be a public school teacher in the year they are using the award.

AWARD VALUE:

The Board of Higher Education is authorized to award up to \$800,000 in tuition waivers annually in support of the Career Advancement Program. Teachers shall be eligible for a tuition waiver for up to three state-supported graduate-level courses (in education or areas related to teacher's subject matter), one for each of their first three years of teaching. Waivers must be used within two years of the year of teaching in a public school that has provided eligibility for the waiver. Individual student awards shall be up to the resident tuition rate at the participating institution.

AWARD PROCEDURE:

- 1) The teacher (after completing each of the first three years of teaching) must request that the Superintendent/Principal indicate that he/she has successfully completed that year's teaching responsibilities.
- 2) The teacher shall be responsible for submitting the required materials to the campus where he/she will enroll. The teacher must also provide evidence to the campus that he/she has successfully passed all three components of the Massachusetts Teachers Test.
- 3) The campus on which the teacher wishes to enroll for a graduate course shall notify the State Office of Student Financial Assistance of teacher's request for a tuition waiver.
- 4) The Office of Student Financial Assistance shall allocate the tuition waiver to the campus, which in turn will award the tuition waiver to the eligible teacher.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each state college and university to maintain adequate documentation of a student's eligibility in the Program.
- b) The Commissioner shall require each campus to furnish annually by August 31 a report detailing the number of Collaborative Teacher recipients for the previous year and the corresponding amount of tuition waived.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records and documents for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION O. HIGH TECHNOLOGY SCHOLAR/INTERN TUITION WAIVER PROGRAM

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public higher education under Section 5 of Chapter 15A of the General laws.

ELIGIBLE PROGRAM:

Computer Information Science/Technology and Engineering programs to be reviewed and determined annually by the Board of Higher Education.

ELIGIBLE STUDENT:

- a) Enrolled in an eligible program as determined by the Board of Higher Education
- b) As determined by the participating company or corporation
- c) As determined by the institution
- d) Is a United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis.
- e) Not in default of any federal or state student loans for attendance at any institution or owe a refund for any previous financial aid received
- f) Has filed a current year Free Application for Federal Student Aid (FAFSA).

AWARD VALUE:

The Board of Higher Education is authorized to provide High Technology Scholar/Intern Tuition Waivers to support enrollment in computer and information science/technology and engineering programs. Individual student awards shall match industry scholarships up to the resident undergraduate tuition at the participating institution.

Campus fees are not included in the waivers. Institutions may, but are not required to, waive specific fees for participating students.

AWARD PROCEDURE:

Participating institutions shall be responsible for the awarding and reporting of such waivers.

GUIDELINES:

Institutions, in conjunction with participating companies, shall develop eligibility criteria and a method for selecting scholar/intern program recipients that shall be filed with the Board of Higher Education upon adoption.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each institution to maintain adequate documentation of a student's eligibility in the Program.
- b) The Commissioner shall require each campus to furnish annually by August 31 a report detailing the number of Collaborative Teacher recipients for the previous year and the corresponding amount of tuition waived.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records and documents for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

**SECTION P. DEPARTMENT OF CHILDREN AND FAMILIES
ADOPTED CHILDREN TUITION WAIVER AND FEE ASSISTANCE PROGRAM**

PURPOSE:

In July 2008, the Massachusetts Legislature amended Chapter 15A, Section 19 of the General Laws. This law provides for full tuition and fee waivers for foster children in the custody of the Department of Children and Families and children adopted through this agency that choose to attend a Massachusetts public institution of higher education, and it requires the Board of Higher Education to establish guidelines for these waivers. Section 19 also states, "The commonwealth, not the institutions of public higher education, shall bear the cost of these waivers, after all reimbursement from the federal government have been exhausted."

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

Any eligible state-supported undergraduate degree or certificate program offered by the institution.

ELIGIBLE STUDENT:

Eligible students shall include children who were in the custody of the Department of Children and Families who were:

- adopted by an eligible Massachusetts state employee through the Department of Children and Families; or
- adopted by an eligible Massachusetts resident through the Department of Children and Families;
- and who meet the following criteria:
 - a) Is a United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis
 - b) Is under the age of twenty-five (25) at the start of the academic year
 - c) Is enrolled in an undergraduate degree, certificate or short-term certificate program, or is taking noncredit courses
 - d) Has applied for financial aid, using the Free Application for Federal Student Aid (FAFSA) and,
 - e) Is in compliance with applicable law regarding Selective Service
 - f) Is not in default of any federal or state student loans for attendance at any institution or owe a refund for any previous financial aid received

- g) Is in good standing and meets the institution's requirements for Satisfactory Academic Progress

ELIGIBLE STATE EMPLOYEE AND RESIDENTS:

Eligible state employees shall include all individuals determined to be Massachusetts state employees at the time of adoption of the eligible student including:

- All full- and part-time employees employed at the time of the adoption by Massachusetts state government at least six months,
- Employees who are working for the state at the time of the adoption and who continue to be employed by the state for at least six months after the adoption.

Eligible Massachusetts residents shall include:

- All individuals determined to be Massachusetts state residents at the time of the adoption of the eligible student.

ELIGIBLE COURSE:

Any state-supported course offered by an institution at a public college or university, excluding all graduate courses and courses in the M.D. program at the University of Massachusetts Medical Center. Eligible courses include those toward an undergraduate degree program, certificate program, short-term certificate program, and non-credit courses.

AWARD VALUE:

Subject to budgetary appropriation, the award under this program shall be equal to 100 percent of all tuition and fees at the resident rate as follows:

- a waiver of tuition for all students who qualify for a waiver of tuition under this section of the Commonwealth Tuition Waiver Program, plus 100 percent of all fees for all state-supported courses or program of study.

In all cases, assistance under this program is awarded after consideration of all other federal scholarship and grant resources. Institutions may not use this tuition and fee assistance program to supplant other state, federal or institutional aid previously awarded to the student. Wherever possible, institutions are encouraged to use the Tuition and Fee Assistance Program to reduce student education loan debt.

INSTITUTIONAL DISBURSEMENT OF GRANT:

Each participating institution must provide information to the Board of Higher Education regarding the student's financial aid award for the current academic year. This information will be used to determine the student's Tuition and Fee assistance. Institutions must disburse funds in compliance with guidelines governing all state financial aid programs.

PARTICIPATION AGREEMENT:

All institutions receiving the Massachusetts Tuition and Fee Assistance funds for eligible Adopted and Foster Children must have an active State Financial Aid Participation Agreement on file with the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each campus to furnish annually by August 31 a report detailing the number of Department of Children and Families recipients for the previous year and the corresponding amount of tuition waived.

- b) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records and documents for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION Q. DEPARTMENT OF CHILDREN AND FAMILIES FOSTER CHILD TUITION WAIVER AND FEE ASSISTANCE PROGRAM

PURPOSE:

In July 2008, the Massachusetts Legislature amended Chapter 15A, Section 19 of the General Laws. This law provides for full tuition and fee waivers for foster children in the custody of the Department of Children and Families and children adopted through this agency that choose to attend a Massachusetts public institution of higher education, and it requires the Board of Higher Education to establish guidelines for these waivers. Section 19 also states, "The commonwealth, not the institutions of public higher education, shall bear the cost of these waivers, after all reimbursement from the federal government have been exhausted."

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

Any eligible state supported undergraduate degree or certificate program offered by the institution.

ELIGIBLE STUDENT:

Shall mean a student who has not earned a baccalaureate degree and meets the following conditions:

- Is a current or former foster child placed in the custody of the Department of Children and Families and remained in custody through age 18 without subsequently being returned home, or
- Is a child whose guardianship was sponsored by the Department of Children and Families through age 18;
- and who meet the following criteria:
 - a) Is a United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis
 - b) Is under the age of twenty-five (25) at the start of the academic year
 - c) Was in the custody of the Department of Children and Families for at least six months before age of 18
 - d) Has applied for financial aid, using the Free Application for Federal Student Aid
 - e) Is enrolled in an undergraduate degree, certificate or short-term certificate program, or is taking noncredit courses
 - f) Is in compliance with applicable law regarding Selective Service
 - g) Is not in default of any federal or state student loans for attendance at any institution or owes a

refund for any previous financial aid received

- h) Is in good standing and meets the institution's requirements for Satisfactory Academic Progress

ELIGIBLE COURSE:

Any state-supported course offered by an institution at a public college or university, excluding all graduate courses and courses in the M.D. program at the University of Massachusetts Medical Center. Eligible courses include those toward an undergraduate degree program, certificate program, short-term certificate program, and non-credit courses. Institutions are encouraged to develop waiver programs for eligible students that would provide 50 percent tuition waiver for any non-state supported course and/or certificate program.

AWARD VALUE:

Subject to budgetary appropriation, the award under this program shall be equal to 100 percent of all billed tuition and fees, at the resident rate, as follows:

- a waiver of tuition for all students who qualify for tuition waivers under this section of the Commonwealth Tuition Waiver Guidelines, plus 100 percent of all fees for all state-supported courses or program of study.

In all cases, assistance under this program is awarded after consideration of all other federal scholarship and grant resources. Institutions may not use this tuition and fee assistance program to supplant other state, federal or institutional aid previously awarded to the student. Wherever possible, institutions are encouraged to use the Tuition and Fee Assistance Program to reduce student education loan debt.

INSTITUTIONAL DISBURSEMENT OF GRANT:

Each participating institution must provide information to the Massachusetts Department of Higher Education regarding the student's financial aid award for the current academic year. This information will be used to determine the student's Tuition and Fee assistance. Institutions must disburse funds in compliance with guidelines governing all state financial aid programs.

PARTICIPATION AGREEMENT:

All institutions receiving funds under the Massachusetts Foster Child Tuition and Fee Assistance Program for eligible Foster Children must have an active State Financial Aid Participation Agreement on file with the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

The Commissioner of Higher Education shall require each campus to furnish annually by August 31 a report detailing the number of Foster Children assisted for the previous year and the corresponding amount of tuition waived.

All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner of Higher Education, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institutions shall retain such books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42

SECTION R. STANLEY Z. KOPLIK CERTIFICATE OF MASTERY TUITION WAIVER

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE STUDENT:

- Any student who has graduated from a Massachusetts high school and awarded a Certificate of Mastery by the Massachusetts Department of Education.
- Is a United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis
- Has completed a FAFSA for the academic term in which the waiver of tuition is requested

CONTINUING ELIGIBILITY:

- Initial recipients of the Stanley Z. Koplik Certificate of Mastery Tuition Wavier shall maintain a G.P.A. of 3.3 for continued eligibility for the tuition waiver for up to eight semesters of study.
- Maintain Massachusetts residency for each enrollment period that the waiver is granted

AWARD VALUE:

The Board of Higher Education is authorized to award non-need-based tuition waivers for state-supported undergraduate courses to recipients of the Certificate of Mastery by the Department of Education. Individual student awards shall be no more than the resident undergraduate tuition rate at the participating institution.

AWARD PROCEDURE:

Certificate of Mastery Tuition Waivers recipients shall be responsible for submitting documentation of such award to the campus where he/she will enroll. The institution shall award tuition waivers to eligible students based on the indicated eligibility criteria and any institution-specific criteria as established by the participating college or university.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the State Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each college and university to maintain adequate documentation of a student's eligibility.
- b) The Commissioner shall require each campus to furnish annually by August 31 a report detailing the number of Stanley Z. Koplik Certificate of Mastery Tuition Waiver recipients for the previous year and the corresponding amount of tuition waived
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION S. VALEDICTORIAN PROGRAM

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE STUDENT:

- a) Student enrolled in a degree program at a public higher education institution in the Commonwealth who has been designated by a public or private high school in the state as a valedictorian and meets the eligibility criteria as established by the public higher education institution for this program.
- b) Maintains satisfactory academic progress in accordance with institutional standards.
- c) A United States citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis.
- d) In compliance with applicable law regarding Selective Service Registration.
- e) Not in default of any federal or state student loans for attendance at any institution or owe a refund for any previous financial aid received.
- f) Has filed a current year Free Application for Federal Student Aid (FAFSA).

AWARD VALUE:

The Board of Higher Education is authorized to award tuition waivers in support of the Valedictorian Program. Campuses of the University of Massachusetts will submit to the University President waiver allocation requests and guidelines for eligibility and awarding of waivers by June 1 prior to the beginning of each academic year in which the waivers will be awarded. The University of Massachusetts President's Office and individual State Universities and Community Colleges will submit to the Board of Higher Education waiver allocation requests and guidelines for eligibility and awarding of waivers by June 15 prior to the beginning of each academic year in which the waivers will be awarded. The Office of Student Financial Assistance will notify each institution of annual award allocations by June 30 prior to the beginning of each academic year in which the waivers will be awarded. The University of Massachusetts Presidents Office will be responsible for allocation of waivers to campuses of the University of Massachusetts, ensuring compliance with eligibility standards and award procedures, and reporting to the Board of Higher Education prior to September 1 information pertaining to the awarding of Valedictorian Program tuition waivers for the prior academic year. State universities and community colleges will be responsible for ensuring compliance with eligibility standards and award procedures and reporting to the Board of Higher Education prior to September 1 information pertaining to the awarding of Valedictorian Program tuition waivers for the prior academic year.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

- a) It shall be the responsibility of each university campus to maintain adequate documentation of a student's eligibility in the Valedictorian Program.
- b) The Commissioner shall require each campus to furnish annually by September 1 a report detailing the number of Valedictorian Program recipients for the previous year and the corresponding amount of tuition waived.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION T. COMMONWEALTH SEPTEMBER 11, 2001 TRAGEDY TUITION WAIVER

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE STUDENT:

To be eligible for a Commonwealth September 11, 2001 Tuition Waiver, a student must meet all of the following requirements:

- a) Be the spouse or child of a resident of Massachusetts who was the victim of the tragic events that occurred on September 11, 2001, and who died or is missing and officially presumed dead as a direct result of the acts of terrorism that occurred in the United States on September 11, 2001.

The student must submit the following to the institution:

1. Copy of the student's legal birth certificate
 2. Certificate of Death for the spouse, parent, or legal guardian (or other official documentation of death)
 3. Proof that the death is connected to the terrorism that occurred on September 11, 2001.
- b) Has filed a current Free Application for Federal Student Aid (FAFSA).

ELIGIBLE COURSE:

Any state-supported course offered by an institution at a public college or university, excluding all graduate courses and coursed in the MD program at the University of Massachusetts Medical Center. Eligible courses include those toward an undergraduate degree programs, certificate program, short-term certificate program, and noncredit courses. Institutions are encouraged to develop waiver programs for eligible students that would provide a 100 percent tuition waiver for any non-state supported course and/or certificate program.

AWARD VALUE:

Students eligible for the Commonwealth September 11, 2001, Tuition Waiver program will be entitled to a tuition waiver equal to 100 percent of the resident tuition rate for eligible state-supported courses offered at the participating public higher education institution.

AUDIT:

- a) The Commissioner shall require each campus to furnish annually by the August 31 a report detailing the number of Commonwealth September 11, 2001, Tuition Waiver recipients for the previous year and the corresponding amount of tuition waived.
- b) All financial books, records and documents pertaining to this program shall at times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such financial books, records and documents are located. The institution shall retain such financial books, records, and documents for seven years. An institution may retain such records for a period of five years if approval is received from Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.

SECTION U. COMMONWEALTH HURRICANE KATRINA EMERGENCY TUITION WAIVER

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE PROGRAM:

Any state-supported course offered by an institution at a public college or university, excluding all graduate courses and courses in the medical degree program at the University of Massachusetts Medical Center. Eligible courses include those toward an undergraduate degree program, certificate program, short-term certificate program, and non-credit courses. Institutions are encouraged to develop waiver programs for eligible students that would provide a 100 percent tuition waiver for any non-state supported course and/or certificate program.

ELIGIBLE STUDENT:

An undergraduate student who is unable to attend an institution due to the effects of Hurricane Katrina and provides as documentation one of the following:

- a) Verification of admission to or enrollment in an institution of higher education for fall semester, 2005; or
- b) A signed Hurricane Katrina Tuition Waiver affidavit attesting admission or enrollment in an academic program leading to a degree, certificate or other recognized credential for the 2005-2006 academic year at an institution

AWARD VALUE:

Students eligible under this program will be entitled to a tuition waiver equal to 100 percent of the resident or non-resident tuition rate for eligible state-supported courses offered at the participating public higher education institution.

The waiver may be awarded to eligible students for the fall semester 2005. The Board of Higher Education may amend these guidelines to permit the awarding of this waiver for the spring 2006 semester.

AWARD PROCEDURE:

Tuition waiver recipients shall be responsible for submitting documentation of eligibility to the institution where he/she will enroll. The institution shall award a waiver equal to the value of required tuition.

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each college and university to maintain documentation of a recipient student's eligibility.
- b) The Commissioner shall require each campus to furnish to the Board of Higher Education a report detailing specific information regarding tuition waiver recipients. The Office of Student Financial Assistance will coordinate specification and procedures for this report.
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, Section 42.

**SECTION V. COMMONWEALTH OF MASSACHUSETTS
CHILDREN OF FALLEN SERVICE MEMBER WAIVER PROGRAM**

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE PROGRAM:

Any two-year or four-year undergraduate (bachelors) degree offered by an eligible institution at a public college or university that is part of an undergraduate degree program.

ELIGIBLE STUDENT:

A student enrolled full or part time in an undergraduate degree program and meeting the following requirements:

- a) a permanent legal resident of Massachusetts for at least one year
- b) has not previously received a prior bachelor's degree, or its equivalent, from a public or private college or university of higher education
- c) has completed the Free Application for Federal Student Aid (FAFSA)
- d) is not in default of any federal or state educational loan for attendance at an institution or owe a refund for any previous financial aid received
- e) is a surviving child of a parent who was an active and full-time member of the armed forces or the United States or National Guard who:
 - 1. died as a result of injuries sustained during active and full-time military service, occurring after 1989 while outside the United States in an armed conflict or hostility; or
 - 2. died while deployed in direct support of military activity in a zone of armed conflict or hostility, outside the United States, occurring on or after January 1, 1989 while outside the United States
 - 3. was a resident of the Commonwealth of Massachusetts at the time of entry and remained a Massachusetts resident throughout full-time military service.
- f) has presented to the institution, documentation of eligibility for this program, as specified
- g) is in compliance with applicable law regarding Selective Service
- h) maintains Satisfactory Academic Progress, according to institutional standards, while pursuing the undergraduate degree

DETERMINATION OF ELIGIBILITY:

The following documents must be presented by the student as proof of eligibility for the Children of Fallen Service Member Waiver:

1. Department of Defense form DD 1300 Report of Casualty; and/or
2. Standard Form 93 (SF93) listing the recipient as a child of a service member killed on active duty

AWARD VALUE:

- a) Waivers awarded under this program for an academic term of study must cover the total cost of tuition and fees. The institution must also provide room and board for any eligible student enrolled full-time and living in an on campus residential facility. Children of Fallen Service Members are to be awarded only after available financial aid from all other sources, excluding loans, have been considered.
- b) All aid awarded under this program, in combination with other state, federal or institutional merit and/or need-based aid, may not exceed the recipient's cost of attendance for any academic period of study
- c) Students qualifying for the Fallen Service Member Waiver must be awarded the full value of billed tuition and fees consistent with these guidelines
- d) A student may not receive a waiver of tuition and fees for more than 130 undergraduate credits earned in pursuit of a bachelor's degree, which shall include those credits earned to complete an associate degree.

PARTICIPATION AGREEMENT:

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the Office of Student Financial Assistance.

AUDIT REQUIREMENTS:

- a) The Commissioner shall require each institution to complete an annual report to the Department of Higher Education which details recipient data for the Commonwealth of Massachusetts Children of Fallen Service Member Waiver Program.
- b) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises whenever such books, records and documents are located. The institution shall retain such financial books, records and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, s. 42.