

Commonwealth of Massachusetts

**Office of Student Financial
Assistance**

STATE FINANCIAL AID PROGRAMS

GUIDELINES AND PROCEDURES

2025-2026



OSFA

The Massachusetts Office of
Student Financial Assistance



Massachusetts Assistance for Student Success Program

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Massachusetts Assistance for Student Success Program

I. General Guidelines

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LOAN DEFAULT AND ELIGIBILITY FOR MASSACHUSETTS STATE FINANCIAL AID PROGRAMS

Students who are in default of any education loan, including a Massachusetts No Interest Loan, are not eligible to receive assistance from Massachusetts State financial programs until their default status has been cleared. A student is, however, eligible to retain funds from a Massachusetts financial aid program if the institution was notified of the default status after the funds were disbursed to the student's account. The student is not eligible for any subsequent disbursement until the default status has been cleared. A monthly updated roster of No Interest Loan defaulters who filed a current year Free Application for Federal Student Aid (FAFSA) is available for schools to access on-line under the "Reports" section of MASSGrant in MASSAid

STUDY ABROAD PROGRAMS AND ELIGIBILITY FOR MASSACHUSETTS STATE FINANCIAL AID PROGRAMS

In order for a student to be considered eligible for Massachusetts state financial aid programs while attending a study abroad program, the four following conditions must be met:

1. Student must maintain an “enrolled” status at his/her “home institution” while attending program abroad. “Home institution” is defined as institution that will be conferring undergraduate degree upon the student.
2. “Home institution” must also be eligible to participate in Massachusetts state financial aid programs and have filed a Participation Agreement with the Massachusetts Office of Student Financial Assistance.
3. Financial aid has to be processed by the “home institution.”
4. Credits that the student earns while studying abroad must be transferable to and accepted by the “home institution.”

CHANGE IN ENROLLMENT STATUS AND ELIGIBILITY FOR MASSACHUSETTS STATE FINANCIAL AID PROGRAMS

A student who has dropped to below full-time status can, on a term by term basis, remain eligible for a Massachusetts State financial aid program that requires full-time enrollment status when the following conditions are true:

1. Student has not withdrawn from the institution.
2. Student has dropped to below full-time enrollment status after he/she had begun attending his/her classes during a specific term.
3. Changes in student's enrollment status occur after the date for such changes to affect the charges that the student incurs at the institution for that specific term.
4. Institution continues to charge the student on a full-time enrolled basis after he or she has officially dropped to below full-time enrolled status.
5. Institution has fully defined and published policies and guidelines that guide its treatment of changes to enrollment status.
6. Student meets all other eligibility criteria of the Massachusetts State financial aid program.

COMPLIANCE ATTESTATION REQUIREMENTS

Institutions of higher education in Massachusetts that administer funds from Massachusetts State financial aid programs are required to perform and submit an independent compliance attestation report of Massachusetts State financial aid programs on an annual basis, **EXCEPT FOR:**

- Institutions of higher education that expend a total amount of Massachusetts State financial assistance funds equal to or less than \$25,000, or other such amount specified by the Commissioner in any fiscal year.
- Institutions located in a state other than Massachusetts
- Institutions that have been approved by the Massachusetts Office of Student Financial Assistance to participate in the every third-year Attestation Compliance Report Submission Program. Those institutions are, however, required to submit copies of any internal or external reports, and/or program reviews (i.e. A-133 Audit, State or Federally conducted program reviews, etc.) on financial aid, that take place at the institution for the rotation years when a Massachusetts State Financial Aid Program specific Compliance Attestation Report is not required by the Massachusetts Office of Student Financial Assistance.

The annual period to be reviewed coincides with the fiscal year end of the institution. Compliance attestation reports are due 6-9 months following the fiscal year end, unless otherwise agreed upon in writing by the Massachusetts Office of Student Financial Assistance (OSFA). Institutions will be advised annually of their compliance attestation requirements vis-à-vis Massachusetts State financial aid programs.

In performing compliance reviews of Massachusetts State financial assistance programs, the independent auditor shall have available, in addition to the Massachusetts Office of *Student Financial Assistance Attestation Guide*, a fiscal year specific copy of Massachusetts State Financial Assistance Programs Guidelines and Procedures, as well as any and all relevant “Dear Colleague” letters published by OSFA. The *Student Financial Assistance Attestation Guide* was last updated in June of 2014.

Compliance Attestation Reports are to be submitted to the Massachusetts Office of Student Financial Assistance via the Massachusetts Executive Office of Education (EOE) Drop Box Central. Drop Box Central is accessible via the following URL:

<https://gateway.edu.state.ma.us/>

Hard copy paper compliance attestation and/or audit reports are no longer accepted by OSFA.

Please contact OSFA at 617.391.6070 for user account information to access Drop Box Central.

MASSACHUSETTS STATE FINANCIAL AID PROGRAMS REFUND POLICY

In calculating refunds to Massachusetts State financial aid programs, institutions shall apply the following rules:

- a) Refund policy shall apply to any student who withdrew from all classes but attended the institution for at least one day during the period of enrollment or payment period for which refunds to state financial aid programs are due;
- b) Consider state financial aid that is already disbursed as well as financial aid that could be disbursed in calculating the amount earned by the student. Financial aid that could be disbursed primarily refers to No Interest Loans that are to be disbursed on a "Late Disbursement" basis and meet such requirements, or any other financial aid programs that are subject to post-withdrawal disbursement;
- c) Percentage of state aid to be retained by the student shall be the same as earned under Title IV programs for the same period of enrollment or payment period, however;
- d) If the student received Title IV aid and has an unpaid tuition and mandatory fees balance to the institution (for the same enrollment period during which he/she withdrew or took an approved leave of absence) as a result of the application of the Return of Title IV Funds policy, the institution may use additional state financial aid (beyond the percentage earned under the Return of Title IV Funds policy) to cover the unpaid tuition and mandatory fees balance, **but not before** all other aid, including aid from direct institutional funds as well as any scheduled cash payment have been used in the payment of the same tuition and mandatory fees balance;
- e) If the student did not receive any Title IV funds during the same period of enrollment or payment period for which refunds to state aid are due, the institution shall employ the Return of Title IV Funds policy to determine the percentage of state aid the student earned during the period of enrollment or payment period for which he/she is being charged. State aid can be retained **only** after all other non-state aid (including aid from direct institutional funds) disbursed to the student for the same period, as well as any scheduled cash payment have been used in the payment of charges that the student incurred for the same period during which he/she withdrew or took an approved leave of absence;
- f) The institution is responsible for collecting and refunding unearned state aid in excess of \$25 that was disbursed directly to the student. If the institution is unable to collect the unearned state fund(s) from student after three (3) documented attempts, it shall refer the amount to the Massachusetts Office of Student Financial Assistance. Such three (3) attempts to collect unearned State aid shall be in the form of three (3) separate letters to the student, within a 45 day period, requesting the unearned amount
- g) Unearned State financial aid shall be refunded in the following order:
 - 1. Tuition Waiver (Need Based and Categorical)
 - 2. Massachusetts No Interest Loan
 - 3. General Scholarship (MASSGrant)
 - 4. Christian A. Herter Memorial Scholarship
 - 5. Foster Child Grant Program
 - 6. Gilbert Grant
 - 7. Public Service Scholarship
 - 8. Cash Grant (Access Grant Program)
 - 9. Part-Time Grant
 - 10. Early Childhood Educator's Scholarship

11. One Family Inc. Scholarship
12. GEAR UP Scholarship
13. Paraprofessional Teachers Preparation Grant
14. High Demand Scholarship Program
15. Completion Incentive Grant Fund
16. Math & Science Teachers Scholarship
17. Scholar-Internship Match Fund
18. National Guard Tuition & Fee Assistance
19. Adopted Children/Foster Children Fee Waiver
20. Children of Fallen Service Member Waiver Program
21. State University Internship Incentive Program

In calculating refunds to Massachusetts State financial aid programs, the institution **must** use the Massachusetts State Financial Aid Programs Refund Worksheet. Please refer to Exhibit 6 in the MASSGrant section for a copy of the Refund Worksheet. Institutions also have the option and are encouraged to use the Massachusetts State Financial Aid Program electronic Refund Worksheet. Such a worksheet can be found under the School Information section at: [Office of Student Financial Assistance / Massachusetts Department of Higher Education](#)

STUDENT-OWED REFUND POLICY

Institutions are responsible for collecting and refunding **unearned** state financial aid in excess of \$25 that is disbursed directly to a student. If the institution is unable to collect the unearned state aid from a student after three (3) documented attempts, it is obligated to refer the student-owed refund to the Massachusetts Office of Student Financial Assistance (OSFA). Such three (3) attempts to collect unearned state aid must be in the form of three separate letters to the student, within a 45-day period, requesting the unearned aid. Please refer to the *Massachusetts State Financial Aid Program Refund Policy*.

Students who owe refunds on previously received Massachusetts State financial aid funds are not eligible to receive assistance from Massachusetts State financial aid programs until the outstanding refund has been paid.

To obtain information on the status of a "Student-Owed Refund" account, please contact the Massachusetts Office of Student Financial Assistance at 617.391.6070.

STATE FINANCIAL AID PROGRAMS RECORD RETENTION REQUIREMENT

Institutions that participate in Massachusetts State financial aid programs are required to maintain records pertaining to their administration of such financial aid programs for a period of seven (7) years following the academic year during which those records were created, unless such records are included in the disposal schedules approved by the Records Conservation Board upon the request of the Office of Student Financial Assistance in accordance with M.G.L.c. 66,s.8.

BOARD OF HIGHER EDUCATION IMMIGRATION AND NATURALIZATION NOTIFICATION

MOVED: It is the policy of the Board of Higher Education that public institutions of higher education in the Commonwealth of Massachusetts notify the Immigration and Naturalization Service (INS) immediately of the name and last known address of any international student requiring a student visa whenever such student does not enroll, enrolls for less than full-time, withdraws or graduates from the institution. The public institutions of higher education shall forward copies of any such INS notifications to the Board of Higher Education.

In accordance with this policy, it is requested that the public institutions of higher education commence in the INS notification process effective October 2, 2001.

Authority: Massachusetts General Laws, Chapter 15A, Section 9.

Background:

Recent media reports have identified problems in the oversight of the international student visa programs in light of the September 11 attack on the World Trade Center. On Sunday, September 23, 2001, the CBS news program, "60 Minutes", ran a story about one of the individuals who committed a terrorist

attack on the World Trade Center in 1993. The story said that this person had been allowed into the United States on a student visa to attend one of the public universities in Kansas but was no longer enrolled when the attack occurred. The Globe (9/30/01, p. A30) reported that the Immigration and Naturalization Service gave "only token attention to a monitoring program" of the status and activities of the more than 284,000 international students currently in the United States with student visas for academic or language programs.

As of 1999, the latest year for which data are available, there were approximately 4,500 international students requiring visas enrolled in Massachusetts public higher education institutions.

When a student who lives abroad applies to and is accepted for enrollment into Massachusetts' public institutions, (s)he must apply to the U.S. State Department for a student visa application Form I-20. Students who already live in our country under a different visa must complete and submit Form I-539 to change to student status. The embassy of the student's country of origin and the State Department must both approve the visa application.

If a student does not enroll or enrolls for less than full-time status, (s)he is considered out of compliance with the terms of the student visa. Under current policy and procedure, when a student fails to comply, the institution may notify the student and the INS of his/her lack of compliance. The federal law does not mandate that institutions automatically notify INS; it stipulates only that the institution provide such information whenever asked by the INS. Anecdotal evidence suggests such requests do not occur regularly; for example, Salem State College has not been asked for such information since the late 1980s. Some campuses consider it "good practice" to notify INS whenever a student is no longer in compliance. If a student who was out of compliance wishes to re-enroll, (s)he must begin with a new I-20 or I-539 application before re-admittance.

The Immigration and Naturalization Service (the Service) regulations (in 8 CFR 214.3(g)(2)) state that:

at intervals specified by the Service but not more frequently than once a term or session, the Service's processing center shall send each school (to the address given on Form I-17 as that to which the list should be sent) a list of all F-1 and M-1 students who, according to Service records, are attending school.

A designated school official at the school must note on the list whether or not each student on the list is pursuing a full course of study and give, in addition to the above information, the names and current address of all F-1 or M1 students, or both, not listed, attending the school and other information specified by the Service as necessary to identify the students and to determine their immigration status. The designated school official must comply with the request, sign the list, state his or her title, and return the list to the Service's processing center within sixty days of the date of the request.

The lack of reliable information about non-citizens living in the United States on a temporary basis has impeded the investigation into the attacks. The proposed new BHE policy to enhance the reporting requirements supports both existing law and good practice. By establishing this policy, it is our intent to be proactive in responding to this threat.

Massachusetts Assistance for Student Success Program

II. MASSGrant

**BOARD OF HIGHER EDUCATION
MASSACHUSETTS ASSISTANCE FOR STUDENT SUCCESS PROGRAM**

PURPOSE

The Massachusetts Assistance for Student Success Grant (MASSGrant) is a state-funded financial aid program, supported through annual appropriations from the Massachusetts State Legislature under Massachusetts General Laws (Chapter 15A, Section 16). MASSGrant provides need-based financial assistance to undergraduate students who reside in Massachusetts and who are enrolled in and pursuing a program of study in any approved public or independent college, university, school of nursing, or other state-approved institution of higher education. The MASSGrant program is designed to support students with the greatest financial need. To qualify, a student must be eligible for a Federal Pell Grant during the same award year. Students remain eligible for a MASSGrant even if their Student Aid Index (SAI) exceeds their institution's Cost of Attendance (COA), provided they also qualify for a Pell Grant in that year.

DEFINITIONS

ELIGIBLE INSTITUTION:

An eligible institution is defined as a state-approved public (as identified in M.G.L. c. 15A, § 5), private, independent, for profit or nonprofit, institution located in the Commonwealth of Massachusetts and authorized to grant undergraduate degrees, certificates, or diploma programs and that is also approved by the U.S. Department of Education to administer Title IV programs. Massachusetts state-approved public, private, independent and non-profit Institutions located in states that have reciprocity agreements (VT, PA, and the District of Columbia) and award associate or bachelor's degrees are also eligible to participate.

ELIGIBLE PROGRAM:

Any approved undergraduate degree or certificate program offered by an eligible institution, as defined.

ELIGIBILITY REQUIREMENTS

To be eligible for the MASSGrant program, the student must:

- a) be enrolled at an eligible institution, as defined;
- b) be eligible for the Pell Grant program as determined by the US Department of Education, if eligible to complete the Free Application for Federal Student Aid (FAFSA); or if ineligible to complete the FAFSA, have an SAI that does not exceed 7,500 as calculated by the Massachusetts Application for State Financial (MASFA);

- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- d) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- e) complete the Free Application for Federal Student Aid (FAFSA) or, if ineligible to complete the FAFSA, then complete the Massachusetts Application for State Financial Aid (MASFA) annually **by June 30, 2025**;
- f) comply with financial aid verification requirements;
- g) not be in default on any federal or state student loans or owe a refund for any previous state financial aid programs;
- h) not have earned a prior associate or bachelor's degree if enrolled at a community college, or a prior bachelor's degree if enrolled at a four-year college or university;
- i) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study leading to a certificate, associate, or bachelor's degree;
- j) not have reached the maximum semesters of eligibility to continue to receive a MASSGrant award (eligibility is limited to a specific number of semesters based on the type of institution that the student attends);
- k) if enrolled in a clock hour program, the student must:
 - 1) complete a minimum of 24 clock hours per week
 - 2) complete a minimum of 320 hours during the period of July 1 – December 31 to qualify for a Fall disbursement
 - 3) complete a minimum of 320 hours during the period of January 1 – June 30 to qualify for a Spring disbursement;
- l) if enrolled in English as a Second Language (ESL) program courses, the student must be simultaneously enrolled in either a certificate, associate or bachelor's degree program in order to be considered eligible for a MASSGrant. Credits a student earns for ESL program courses may be counted towards his or her full-time enrollment status; and
- m) meet satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

MASSGRANT CONDITIONS

- Disbursement of funds: MASSGrant funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education.
- MASSGrant funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the fiscal year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request; and no less than on a quarterly basis.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the MASSGrant program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned a prior associate or baccalaureate degree (or equivalent), which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the MASSGrant program.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded MASSGrant funds as follows¹:

Bachelor's Degree (Four-Year or Three-Year Degrees)

Full-Time (4YR)	Maximum of 4 years, 8 semesters for full-time (minimum of 12 enrolled credits per academic term)
Full-Time (3YR)	Maximum of 3 years, 6 semesters for full-time (minimum of 12 enrolled credits per academic term)

Associate Degree

Full-Time	Maximum of 2 years, 4 semesters for full-time (minimum of 12 enrolled credits per academic term)
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¹ An additional year of assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

Certificate Program

Full-Time	Maximum of 2 semesters for full-time (minimum of 12 enrolled credits per academic term)
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AWARD VALUE

Subject to appropriation and the availability of funds, the **MASSGrant Award** is a resource made available to students enrolled at any approved public or independent college, university, school of nursing, or other state-approved institutions in the Commonwealth. MASSGrant awards should not exceed an institution's published annual Cost of Attendance (COA).

Awards are determined by an indexing system approved by the Commissioner of Higher Education that considers the following: federal Student Aid Index, Pell Grant eligibility, type of institution a student attends, and available state appropriated funding.

The BHE approved **MASSGrant awards for Academic Year 2025-26** can be accessed by clicking the following link to the payment chart [here](#).

AWARD CALCULATION

Students enrolled at an eligible institution and pursuing an undergraduate program of study leading to a certificate, associate, or bachelor's degree may receive a **MASSGrant Award** to cover their **Financial Unmet Need** for costs associated with **Cost of Attendance (COA)** for the corresponding academic term or year. The *award* calculation for an eligible student is as follows:

$$\text{MASSGrant Award} = \text{Cost of Attendance (COA)} \text{ (minus) All Other Non-Loan Aid}$$

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the MASSGrant program, and that the student is enrolled full-time in an approved certificate, associate, or bachelor's degree program. Further, the institution is required to verify that the student has not earned a prior degree (or equivalent) before awarding and disbursing funds, which may be done through a signed affidavit after all reasonable attempts were made to secure prior transcripts, if any.

MASSGrant funds are disbursed to the institution in two payments for the Fall and Spring semesters for students who meet all eligibility criteria, as certified by the institution. Payment of MASSGrant funds is sent directly to the institution from the Commonwealth's Comptroller's Office. One hundred percent of the funds from the MASSGrant award shall be used to credit the student's account. Funds must be disbursed to students during the traditional academic year.

Institutions are required to refund the DHE any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program.

Refunds may occur because of adjustments to SAI, changes to dependency status, and/or changes to a student's enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged.

ANNUAL REVIEW

The Department of Higher Education (DHE) is responsible for evaluating the effectiveness of the MASSGrant program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the MASSGrant must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the MASSGrant.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the MASSGrant. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

III. No Interest Loan

BOARD OF HIGHER EDUCATION MASSACHUSETTS NO INTEREST LOAN

PURPOSE

In 1992, the Commonwealth of Massachusetts Legislature created the No Interest Loan (NIL) Program. The NIL program is designed to provide eligible, Massachusetts residents who demonstrate financial need, attending post-secondary educational institutions in Massachusetts with a state-funded loan. Administered by the Massachusetts Office of Student Financial Assistance, the NIL program offers zero interest loans to assist in meeting educational costs. Students have a period of ten (10) years to repay their NIL loan(s).

DEFINITIONS

ELIGIBLE INSTITUTION:

Institutions wishing to participate in the No Interest Loan program must have signed a State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance, meet the program's loan cohort default rate requirements, as well as achieved established performance measures with respect to NIL loan exit counseling process. In addition, the institution must be either private, public, independent, for profit or nonprofit, issuing associate and/or bachelor's degree, or certificate programs and located in Massachusetts. The institution must be eligible to participate in Federal Title IV programs and fully accredited. The institution must continue to meet all the above and other requirements throughout its participation in the No Interest Loan program

ELIGIBLE PROGRAM:

Any approved undergraduate degree or certificate program offered by an eligible institution, as defined.

ELIGIBILITY REQUIREMENTS

To be eligible for the No Interest Loan program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;

- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned a bachelors degree (or the equivalent);
- h) enroll, as a matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

NO INTEREST LOAN CONDITIONS

- Disbursement of funds: funding is to be appropriated to participating institutions through a formula approved by the Commissioner of Higher Education.
- Funds appropriated during an academic year must be committed to students by institutions and expended at the conclusion of the fiscal year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the No Interest Loan program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility.
- Funds may be awarded to support summer enrollment that occurs prior to the end of the corresponding fiscal year, if funds are available.
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the program.

- The BHE shall annually establish the tuition rates for the community colleges and state universities and monitor the mandatory fees set by colleges' respective Boards of Trustees.
- Students wishing to become eligible for a No Interest Loan for the academic year 2025-2026 must complete their 2025-2026 Free Application for Federal Student Aid (FAFSA) or state-equivalent form, by the priority deadline date of March 13, 2026.
- Eligible students must have an SAI under \$20,000.
- The institution has the responsibility for validation of such SAI. Likewise, schools have the same responsibility to ensure that the borrower meets all other requirements of the No Interest Loan program prior to advancing a NIL award.
- A student's current year maximum eligibility is listed on the NIL Eligibility Roster under "Maximum Loan Amount". In view of the fact that the program has a lifetime borrowing limit of \$20,000, a student's aggregate loan history is taken into account when determining current year eligibility. The minimum initial NIL award a student can receive is \$1,000. Students are required to file all proper documentation including but not limited to; Entrance Interview Counseling, a signed Promissory Note, Disclosures and Exit Interview Counseling.

AWARD VALUE

Students are eligible to receive between \$1,000 and \$4,000 annually. There is a lifetime borrowing limit of \$20,000.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the No Interest Loan Program and that the student is enrolled in an approved certificate or associate or bachelor's degree program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the No Interest Loan Program

When completing the promissory note, schools have the option of selecting either "Fall, Spring and/or Summer" as their disbursement periods, in which case, the system will automatically assign a disbursement date. Institutions may also choose to select their own disbursement dates, which provides them with the flexibility of having disbursed NIL funds arrive on their campus, later than the NIL system defaults would allow. Under either scenario, NIL disbursement dates shall meet the following criteria:

- Each loan must have at least two (2) disbursements, unless the loan meets at least one of the following criteria, in which case, the system will assign one disbursement date only:
 - The current date is greater by 45 days or less than the loan period end date.
 - The loan period is less than 155 days in length.
- Each subsequent disbursement date must be greater than or equal to the previous disbursement date.

First Disbursement

- If the current date is less than or equal to 20 days prior to the start of the loan period, the current date shall be assigned as the first disbursement date.
- If the current date is greater than 20 days prior to the start of the loan period, a first disbursement date equal to 20 days prior to the start of the loan period shall be assigned.

Second Disbursement/No Third Disbursement Selected

- If the current date is less than or equal to the midpoint of the loan period less 20 days, the midpoint of the loan period less 20 days shall be assigned as the second disbursement date. If the current date is greater than the midpoint of the loan period less 20 days, the current date shall be assigned as the second disbursement date.
- In either case, if the date calculated for the second disbursement date is less than that assigned for the first disbursement, the disbursements will occur in two consecutive weeks.

Second Disbursement/Third Disbursement Selected

- If the current date is less than or equal to the one-third point of the loan period less 20 days, the one-third point of the loan period less 20 days shall be assigned as the second disbursement date.
- If the current date is greater than the one-third point of the loan period less 20 days, the one-third point of the loan period less 20 days shall be assigned as the second disbursement date.
- In either case, if the date calculated for the second disbursement date is less than that assigned for the first disbursement, the disbursements will occur in two consecutive weeks.

Disbursement Amounts

Disbursement amounts are determined by dividing the loan amount by the number of disbursements. Each disbursement amount must be a whole dollar amount.

In the event that the loan amount is not evenly divisible by the number of disbursements and there are only two disbursements, the first disbursement shall be truncated to a whole dollar amount and the total loan amount less the first disbursement amount is the amount of the second disbursement.

When there are three disbursements, the first and second disbursements shall be truncated to whole dollar amounts and third disbursement amount shall be equal to the loan amount less the first and second disbursement amounts. For example, if a loan for \$2625 must be disbursed in 2 disbursements, the first disbursement would be for \$1312 and the second disbursement would be for \$1313. If a loan for \$2000 must be disbursed in 3 disbursements, the first and second disbursement would be for \$666 and third disbursement would be for \$668.

LATE DISBURSEMENT:

No Interest Loans that are to be disbursed on a “late disbursement” basis must meet the following conditions:

- Loan is being disbursed late **only** due to the expiration of the loan period.
- Loan application has been certified by institution for the enrollment period and received by OSFA, prior to the expiration of the loan period.
- Loan proceeds **must** be disbursed no later than **45 days** after the expiration of the loan period.
- Loan proceeds are to be used to pay for educational expenses that the school determines the student incurred for the period during which they were enrolled and eligible.
- The student must have appeared on a NIL Eligibility Roster that the school received from OSFA, prior to the expiration of the loan period.

REFUNDS:

Institutions are expected to refund to the No Interest Loan Program partial or all amounts from a disbursement that a borrower did not use towards educational expenses at any point during the academic year. Refunds are to occur within thirty (30) days of the school’s receipt of the loan funds. In processing refunds, schools must use the **Massachusetts No Interest Loan Refund Form** to list the students for whom monies are being returned and the amounts. Please note that no refund will be processed by OSFA unless a check for the correct amount of the refund(s) accompanies the refund form. **It is important for schools to note that refunds are considered repayments of loans, and those funds do not revert to a school’s**

allocation, and therefore, are not available for new awards within the same academic year.

Refund checks should be made payable to:
The Commonwealth of Massachusetts

Refund Forms and Checks are to be forwarded to:
135 Santilli Highway
Everett, MA 02149

Schools should not send refunds/repayments directly to Educational Computer Services, Inc. for processing. If a refund is sent to ECSI and processed without the knowledge of OSFA, there is the risk that the student's disbursement record will not be updated on OSFA's NIL History File and the student's eligibility may be adversely affected in the future. Refunds processed by OSFA are subsequently submitted to ECSI's loan servicing department for adjustments to a borrower's account.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the No Interest Loan Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the No Interest Loan Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the No Interest Loan Program
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the No Interest Loan Program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

IV. Christian Herter Memorial Scholarship

**BOARD OF HIGHER EDUCATION
CHRISTIAN A. HERTER MEMORIAL SCHOLARSHIP**

PURPOSE

The Christian A. Herter Memorial Scholarship program was established in 1972 by the Massachusetts State Legislature as an early identification program to assist students whose socio-economic backgrounds may inhibit their ability to pursue higher education.

In accordance with Massachusetts General Laws, Chapter 15A, Section 16, the Department of Higher Education shall offer the Christian A. Herter Memorial Scholarship annually to twenty-five (25) tenth and eleventh grade high school students. These selected students are eligible to receive up to fifty percent (50%) of their calculated financial need (following high school graduation) once they enroll at the college of their choice within the continental United States. Students that are selected for this program must have overcome major adversity in their lives. Such adversity may include physical or mental abuse, catastrophic illness, geographic or societal obstacles. Selected students must also demonstrate strong academic potential for post-secondary success.

DEFINITIONS

ELIGIBLE INSTITUTION:

Any public or private institution in the continental United States and/or in the Commonwealth of Massachusetts as defined under Section 5, Chapter 15A, of the General Laws or other accredited post-secondary institution.

ELIGIBLE PROGRAM:

An approved certificate or degree program offered by a public or private institution in the Commonwealth of Massachusetts or other state within the continental United States.

ELIGIBILITY REQUIREMENTS

To be eligible for the Herter Scholarship Program, a student must be a current tenth, or eleventh grade student enrolled in high school and upon receipt of the scholarship meets the following requirements:

- a) Is enrolled in and graduates from a public or private secondary school in the Commonwealth of Massachusetts;
- b) Physically resides in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education policy;
- c) Is a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV

regulations; or has an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;

- d) Meets Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- e) Exhibits difficult personal circumstances, high financial need, and strong academic promise to pursue higher education beyond the secondary educational level;
- f) Upon graduation from high school, is enrolled as a full-time undergraduate student in an eligible program as defined by the institution;
- g) Completes the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- h) Is not in default on any federal or state student loans for attendance at any institution, nor owes a refund for any previous state financial aid program;
- i) If enrolled in a clock hour program, the student must:
 - a. complete a minimum of 24 clock hours per week
 - b. complete a minimum of 320 hours during the period of July 1-December 31 to qualify for a Fall disbursement
 - c. complete a minimum of 320 hours during the period of January 1-June 30 to qualify for a Spring disbursement;
- j) If enrolled in English as Second Language (ESL) program courses, the student must be simultaneously enrolled in a certificate, associate or bachelor's degree to be considered eligible for a Herter Scholarship;
- k) If a Herter Scholarship recipient defers enrollment, they must be granted approval by the Office of Student Financial Assistance to maintain eligibility for the Herter Scholarship. Deferred eligibility for the Herter Scholarship can only be for a period not to exceed two (2) years.

HERTER SCHOLARSHIP CONDITIONS

- All scholarships awarded under the Christian A. Herter Memorial Scholarship Program, must be made based on demonstrated financial need.
- Students qualifying for a scholarship must complete the institution's required application process for student financial aid.

- Herter Scholarships, in combination with other resources (excluding MASSGrant) in the student's financial aid package, may not exceed the student's demonstrated financial need.
- Students selected by the U.S. Department of Education for verification must complete all required documentation prior to receipt of a Herter Scholarship.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded Herter Scholarship funds as follows:

Bachelor's Degree

Full-Time Maximum of 4 years, 8 semesters for full-time (minimum of 12 enrolled credits per academic term). Additional assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

Associate Degree

Full-Time Maximum of 2 years, 4 semesters for full-time (minimum of 12 enrolled credits per academic term). Additional assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

Certificate Program

Full-Time Maximum of 2 semesters

AWARD VALUE

Individual scholarships for an award period may vary. The student is eligible to receive an award of up to fifty percent (50%) of their financial need each academic year, provided the student demonstrates need utilizing Federal Methodology, Cost of Attendance minus the Student Aid Index (SAI). The Department of Higher Education may establish an annual maximum award for this program, based on the annual fiscal year appropriation.

AWARD CALCULATION

- Christian A. Herter Memorial Scholarship awards are determined based on demonstrated financial need.
- Students qualifying for a scholarship must complete the institution's required application process for student financial aid.

- Herter Scholarships, in combination with other resources (excluding MASSGrant) in the student's financial aid package, may not exceed the student's demonstrated financial need, within the Cost of Attendance.
- Students selected by the U.S. Department of Education for verification must complete all required documentation prior to receipt of a Herter Scholarship.

The annual Herter Scholarship award for an eligible student is as follows:

Cost of Attendance (minus) Student Aid Index (SAI) = financial need
Herter Scholarship = .5 of financial need (up to annual established maximum)

AWARD DISBURSEMENT

Awards granted under the Christian Herter Scholarship Program will be disbursed as follows:

- 1) Prior to the start of the academic year, institutions are asked to verify the student's cost of attendance and calculated Student Aid Index, enabling OSFA to determine the value of the Herter Scholarship.
- 2) A Certification/Payment Roster is provided to each institution at the beginning of each academic year detailing the Herter Scholarship recipient, social security number and award amount.
- 3) Payment is sent directly from the Commonwealth's Treasurer's Office to the institution.
- 4) The institution must certify the student as eligible according to the guidelines established for the Christian Herter Scholarship Program.
- 5) Students are responsible for providing the Office of Student Financial Assistance with official transcripts at the end of each academic year to determine eligibility for continued participation in this program.

REFUNDS

All refunds must accompany the completed Certification/Payment and online refund process identified by the Office of Student Financial Assistance.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Christian A. Herter Scholarship program. Institutions that have signed an agreement to

participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or their designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All Massachusetts institutions receiving funds under the Christian A. Herter Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Christian A. Herter Scholarship program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Christian A. Herter Scholarship program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

V. MASSReconnect

**BOARD OF HIGHER EDUCATION
FREE COMMUNITY COLLEGE PROGRAM—MASSRECONNECT**

PURPOSE

MassReconnect and MassEducate, collectively, are the Commonwealth’s “free community college” grant programs. Both MassReconnect and MassEducate are subject to the availability of funding and appropriation by the Massachusetts legislature. These guidelines pertain to the state’s MassReconnect program.¹

MassReconnect provides financial assistance to full and part-time undergraduate students, who are 25 years of age or older, meet the eligibility requirements, and are enrolled in and pursuing an approved program of study at one of the Commonwealth’s 15 public community colleges. The program is designed to provide last dollar financial assistance to ensure that all community college students have adequate resources to fully cover tuition and fees towards a certificate or associate degree at a community college. MassReconnect students also receive an additional *Allowance and Support Award* for books and supplies, and other approved costs to mitigate barriers that may impede opportunities for students to enroll in college and complete a program of study.

DEFINITIONS

ELIGIBLE INSTITUTION:

A Massachusetts community college within the public system of higher education as identified in Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

An approved certificate or associate degree program offered at a Massachusetts public community college.

ELIGIBILITY REQUIREMENTS

To be eligible for the MassReconnect program, a student must:

- a) be enrolled in an eligible institution, as defined;
- b) be not less than 25 years of age as of the first day of classes for which funds are being awarded;
- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;

¹ For information on the state’s MassEducate program please see here: www.mass.edu/MassEducate

- d) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- e) complete the Free Application for Federal Student Aid (FAFSA) or, if ineligible to complete the FAFSA, then complete the Massachusetts Application for State Financial Aid (MASFA);
- f) comply with financial aid verification requirements;
- g) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- h) have not previously earned an associate's or bachelor's degree;
- i) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an eligible undergraduate program of study leading to a certificate or associate degree; and
- j) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

MASSRECONNECT CONDITIONS

- Disbursement of funds: MassReconnect funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education.
- MassReconnect funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the academic year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request, and no less than on a quarterly basis.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under MassReconnect program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned more than one prior associate or a baccalaureate degree (or equivalent) which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.

² M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Acts of 2024. For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

- MassReconnect may be awarded to support summer enrollment, if funds are available.
- Institutions are required, upon request, to submit data to the DHE to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the MassReconnect program.
- The BHE shall annually establish the tuition rates and monitor the fees set by community college Boards of Trustees for compliance with statutory requirements mandated for Massachusetts community colleges participating in MassReconnect, M.G.L. c. 15A, Section 5B(c)(1) and (d) and Section 9(i).

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded MassReconnect funds as follows³:

Associate Degree

Full-Time	Maximum of 3 years, 6 semesters for full-time (minimum of 12 enrolled credits per academic term).
Part-Time	Maximum of 5 years, 10 semesters for part-time (6 enrolled credits minimum per academic term).

Certificate Program

Full-Time	Maximum of 4 semesters
Part-Time	Maximum of 8 semesters

AWARD VALUE

Subject to appropriation and the availability of funds, the **MassReconnect Grant** is a last dollar resource awarded to eligible students under this program and shall not exceed the calculated costs of tuition and fees as determined by the institution and published in its annual Cost of Attendance (COA), and approved by the BHE pursuant to M.G.L. c.15A, Section 5B(c)(1), for the academic term during which the award is made.

An additional **Allowance and Support Award** (also referred to as a stipend) of up to \$1,000 for books and supplies, and other approved costs, may be awarded to students who meet the eligibility requirements and award criteria.

³ An additional year of assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

MassReconnect funds expended beyond costs related to tuition and fees, and the allowance for books, supplies, and other costs as defined, must be approved or authorized by the Commissioner of Higher Education, or their designee.

Higher cost certificate or degree programs, which exceed 150% of the institution's average tuition and fee costs, may require annual approval by the Massachusetts Department of Higher Education (DHE).

AWARD CALCULATION

All students who meet the eligibility requirements and are enrolled in an undergraduate program of study leading to a certificate or associate degree may receive a MassReconnect award to cover Financial Unmet Need for costs associated with tuition and fees, as defined and approved by the BHE, for the corresponding academic term or year. The award calculation for an eligible student is as follows:

MassReconnect Grant = Tuition and Fees (minus) All Other Non-Loan Aid

An additional MassReconnect **Allowance and Support Award** (also referred to as a stipend) for books and supplies, and other approved costs is available to students who meet the program's eligibility requirements. The maximum Allowance and Support Award in any academic year shall be \$1,000, and shall not exceed \$600 in any single semester. This award calculation, **based on the number of enrolled credits each semester**, is as follows:

Allowance and Support Award = Cost of Attendance COA (minus) All Other Non-Loan Aid

12 or more credits	up to \$1,000 per academic year; not to exceed \$600 per semester
9-11 credits	up to \$800 per academic year, not to exceed \$450 per semester
6-8 credits	up to \$500 per academic year, not to exceed \$300 per semester

Student eligibility for the **Allowance and Support Award** should be assessed and determined at the beginning of each semester and the student's semester award amount should align with the student's credit hours per semester.

For financial aid award packages that were finalized before the effective date of these guidelines using the **Allowance and Support Award** funding amounts approved for Academic Year 2024-2025, please note the following: in no event shall any such student's Fall 2025 **Allowance and Support Award** amount be reduced to recoup the difference between the amount awarded and the amount allowable pursuant to these guidelines. To address this issue and ensure that student Fall awards are not reduced, the DHE has

maintained the prior maximum allowable amounts for a semester award, subject to the updated maximum annual award for Academic Year 2025-2026.

Example #1: Student A enrolls in the fall semester for the first time during Academic Year 2025-2026. Student A enrolls in 12 credits and prior to the effective date of these guidelines the student was awarded the maximum annual Allowance and Support Award based on last year's guidelines (e.g., \$1200) with a fall disbursement in the amount of \$600; to stay within the \$1000 maximum award Student A's spring disbursement would be \$400 (provided the student maintains their prior semester credit load (e.g., 12 credits) for the spring semester.

Example #2: Student B enrolls in the spring semester for the first time during Academic Year 2025-2026. Student B enrolls in 12 credits, and receives an Allowance and Support Award spring disbursement in the amount of \$600; to stay within the \$1000 maximum award Student B's summer disbursement would be \$400 (provided the student enrolls in and maintains their prior semester credit load (e.g., 12 credits) for the summer semester.

Example #3: Student C enrolls in the fall semester for the first time during Academic Year 2025-2026. Student C enrolls in 9 credits, and receives an Allowance and Support Award fall disbursement in the amount of \$450; to stay within the \$800 maximum award Student B's spring disbursement would be up to \$350 (provided the student maintains their prior semester credit load (e.g., 9 credits) for the spring semester.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the MassReconnect program, and that the student is enrolled in an approved certificate or associate degree program. Further, the institution is required to verify that the student has not earned a prior bachelor's degree (or equivalent), and/or if the student has earned more than one associate's degree (if applicable), before awarding and disbursing funds, which may be done through a signed affidavit after all reasonable attempts were made to secure prior transcripts, if any.

Institutions are required to refund to the DHE any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Refunds may occur because of adjustments to SAI, changes to dependency status, and/or changes to a student's enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged. MassReconnect may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the MassReconnect program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the DHE or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the MassReconnect program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the MassReconnect program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the MassReconnect program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

VI. John and Abigail Adams Scholarship

**BOARD OF HIGHER EDUCATION
JOHN AND ABIGAIL ADAMS SCHOLARSHIP**

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, except those institutions retaining Massachusetts resident tuition payments.

ELIGIBLE PROGRAM:

Any state-supported undergraduate degree program offered by an eligible institution.

ELIGIBILITY REQUIREMENTS

To be eligible for the John and Abigail Adams Scholarship program, the student must:

- a) be admitted to an eligible institution, as defined;
- b) have graduated from or under the auspices of a Massachusetts public high school, and
 - a. as of June 2005 thru June 2015, and by the end of the junior year, was in the highest 25 percent in their district on the 10th grade Massachusetts Comprehensive Assessment System (MCAS) English Language Arts and Mathematics test, and scored in the Advanced category on one test and Proficient or Advanced on the other test; or
 - b. as of June 2016 or thereafter, and by the end of their junior year, was in the highest 25 percent in their district on the 10th grade Massachusetts Comprehensive Assessment System (MCAS) English Language Arts, Mathematics and Science test, and scored in the Advanced category on one test and Proficient or Advanced on the other tests;(Note: an earned GED does not fulfill the high school graduation requirement)
- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- d) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;

- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- f) comply with financial aid verification requirements;
- g) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- h) have not earned a bachelor's degree (or the equivalent);
- i) maintain a cumulative 3.0 GPA on all academic coursework at the institution awarding the degree; or if transferring, has maintained a cumulative 3.0 GPA at the transfer institution;
(Note: The institution is responsible for verifying the cumulative GPA at the end of the spring semester of each academic year; if the student drops below the required 3.0 GPA, the scholarship is permanently forfeited.)
- j) enroll, as a matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in a Massachusetts public college or university; and
- k) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

The institution may not grant an exception to the above requirements. In rare and extenuating circumstances, the Commissioner or the Commissioner's designee may permit an exception to the above criteria and authorize (in writing) the institution to award the Adams Scholarship. In such cases, supporting documentation must be provided by the student and maintained by the institution and the Office of Student Financial Assistance.

AWARD VALUE

- The award under this program shall be equal to the value of required tuition (not including fees) for all state-supported undergraduate courses.
- The scholarship may be awarded to eligible students for a maximum of eight semesters of enrollment (not including summer terms), which must occur within six years following high school graduation.
- The program will be awarded at no cost to the institution.

AWARD PROCEDURE

Beginning with the Class of 2005, the State Department of Education will annually certify the eligibility of student recipients for the John and Abigail Adams Scholarship. Consistent with other programs, the State Department of Education will provide students with a letter of eligibility and provide the Board of Higher Education and Office of Student Financial Assistance with a list of eligible students designated as Adams Scholarship recipients. Each John and Abigail Adams Scholarship recipient shall be responsible for submitting documentation of eligibility to the institution where he/she will enroll.

The Office of Student Financial Assistance shall annually provide institutions with a roster of eligible students that have met the requirements of completing the FAFSA. Institutions may use this roster to verify student eligibility whenever other documentation is not available.

The institution shall award scholarships equal to the value of required tuition. The Adams Scholarship is a non-need based program. Financial need is not a requirement for eligibility. However, recipients must meet all requirements as defined for eligible students including filing the FASFA.

Retroactive effect: If a student becomes eligible for or seeks to utilize the scholarship after enrolling at an eligible institution, the institution may apply the scholarship (tuition waiver) retroactively only to the beginning of the academic year during which the student demonstrates or presents evidence of eligibility. Institutions may not issue retroactive credits or tuition refunds for prior semesters in prior fiscal years.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the John and Abigail Adams Scholarship. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the John and Abigail Adams Scholarship must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the John and Abigail Adams Scholarship.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the John and Abigail Adams Scholarship. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

VII. Public Service Grant

BOARD HIGHER EDUCATION PUBLIC SERVICE GRANT

PURPOSE

In recognition of the hardship that a family experiences upon the loss of a parent and/or spouse who is killed or missing in the line of public service duty in the Commonwealth, a grant program has been established to provide educational opportunity to the remaining family members. This important program is the only Grant Program not based on demonstrated financial need, but rather on entitlement.

DEFINITIONS

ELIGIBLE INSTITUTION:

A Massachusetts public institution of higher education college within the public system of higher education as identified in Section 5 of Chapter 15A of the General Laws, or a Massachusetts independent higher education institution that is authorized by the Commonwealth to offer undergraduate degree programs

ELIGIBLE PROGRAM:

Any approved undergraduate degree or certificate program offered by an eligible institution, as defined.

ELIGIBILITY REQUIREMENTS

To be eligible for the Public Service Grant program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;

- g) have not earned a bachelor's degree (or the equivalent);
- h) enroll, as a matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

PUBLIC SERVICE GRANT CONDITIONS

- Student will provide the necessary documentation to evidence one of the following conditions:
 - Child or widowed spouse of a Massachusetts Police Officer, Firefighter or Corrections Officer who was killed or died from injuries received while performing their duties. This shall also include authorized training duty.
 - Child of a Prisoner of War or Military Service Person Missing In Action in Southeast Asia whose war time service was credited to the Commonwealth and whose service was between February 1, 1955 and the termination of the Vietnam campaign.
 - Child of a Veteran whose service was credited to the Commonwealth and who was killed in action or died as a result of such service.
- If enrolled in a clock hour program, the student must:
 - Complete a minimum of 24 clock hours per week a minimum of 320 hours during the period of July 1 – December 31 to qualify for a Fall disbursement
 - Complete a minimum of 320 hours during the period of January 1 – June 30 to qualify for a Spring disbursement.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the Public Service Grant to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility.
- Funds may be awarded to support summer enrollment that occurs prior to the end of the corresponding fiscal year, if funds are available.

- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the program.
- The BHE shall annually establish the tuition rates for the community colleges and state universities and monitor the mandatory fees set by colleges' respective Boards of Trustees.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded Public Service Grant funds as follows:

Associate Degree

Full-Time Maximum of 2 years, 4 semesters for full-time (minimum of 12 enrolled credits per academic term).

Bachelor's Degree

Full-Time Maximum of 4 years, 8 semesters for full-time (minimum of 12 enrolled credits per academic term).

AWARD VALUE

For a student attending a Massachusetts Public College or University, the award shall be equal to the cost of the institution's full time annual tuition and mandatory fee charges.

For a student attending a Massachusetts Independent College or University, the award shall be equal to the full-time annual tuition charge to the University of Massachusetts, Amherst.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Public Service Grant, and that the student is enrolled in an approved certificate or associate or bachelor's degree program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the Public Service Grant

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Public Service Grant. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of

Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Public Service Grant must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Public Service Grant
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Public Service Grant. OSFA will establish the timeline, specifications, 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 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.

APPLICATION PROCEDURES

- a) Complete a Public Service Grant Application and submit the necessary documentation.
- b) Applicant must also file a Free Application for Federal Student Aid Application (FAFSA) or another state-approved equivalent form.
- c) For a child or widowed spouse of a Massachusetts Police Officer, Firefighter, or Corrections Officer whose death occurred in the line of duty, submit a certificate from the Massachusetts Retirement Board.
- d) For a child of a Prisoner of War, Military or Service person missing in action in Southeast Asia between February 1, 1955 and the termination of the Vietnam campaign, or veteran was killed in action or who died as a result of such service, submit the following:
 - Copy of your birth certificate.
 - Copy of Veteran's death certificate.

- DD214 Form to show Veteran's service was credited to Massachusetts. You may obtain this form from your local Veterans Administration Office.
- Proof that Veteran's death was service connected. You may obtain this from:
The Veterans Administration Regional Office
J.F.K. Federal Building
100 Cambridge Street
Boston, Massachusetts 02203

FIRST TIME APPLICANTS ONLY

All first-time applicants must complete the application and provide all the supporting documentation that is requested. It is the applicant's responsibility to provide all the necessary information. The Office of Student Financial Assistance reserves the right to request additional documentation if necessary.

RENEWAL APPLICANTS ONLY

To renew the Public Service Grant, recipients must annually, contact the Office of Student Financial Assistance for a renewal application for the Public Service Grant Program.

The application and all supporting documentation must be submitted to:

**DEPARTMENT OF HIGHER EDUCATION
Office of Student Financial Assistance
Massachusetts Public Service Grant Program
135 Santilli Highway
Everett, MA 02149**

APPLICATION DEADLINE IS MAY 1, 2026

The May 1st deadline applies to new applicants only

Massachusetts Assistance for Student Success Program

VIII. Part-Time Grant

BOARD OF HIGHER EDUCATION PART-TIME GRANT PROGRAM

PURPOSE

Demographic changes impacting current and future student populations have a direct relationship to the number of part-time students who seek higher education. In Massachusetts, as in other states, the number of part-time students is expected to continue to grow due to shifts in the state's demographic and economic circumstances, thus requiring more adults to return to the classroom on a part-time basis. Rapidly increasing college costs have forced students to reconsider their college enrollment plans. More and more, part-time programs are becoming viable alternatives. As colleges continue to shift their financial aid programs towards the full-time population, part-time programs have become even less affordable. The Massachusetts Part-Time Grant Program serves as a bridge between higher education and the part-time student population.

DEFINITIONS

ELIGIBLE INSTITUTION:

An eligible institution is defined as a public, private, independent, for-profit or nonprofit institution in the Commonwealth of Massachusetts authorized to offer undergraduate degrees or certificate programs. The institution must be accredited and eligible to participate in the Federal Title IV programs.

ELIGIBLE PROGRAM:

Any eligible degree or certificate program offered by an institution.

ELIGIBILITY REQUIREMENTS

To be eligible for the Part-Time Grant program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law;
- e) comply with financial aid verification requirements;

- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) not have earned a prior associate if enrolled at a community college, or a prior bachelor's degree (or the equivalent) if enrolled at a four-year college or university;
- h) enroll, as a matriculated student, on a part-time basis (minimum of 6 credits, or the equivalent) in an eligible undergraduate program of study leading to a certificate, associate, or bachelor's degree; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

NOTE: The Office of Student Financial Assistance maintains an accommodation policy for students with disabilities. Grant awards may be prorated to accommodate the needs of students with disabilities who, with proper medical documentation, must enroll in fewer than six credits per academic term.

PART-TIME GRANT CONDITIONS

- Disbursement of funds: Part-Time Grant funding is to be appropriated to participating institutions through a formula approved by the Commissioner of Higher Education.
- Part-Time Grant funds appropriated during an academic year must be committed to students by institutions and expended at the conclusion of the fiscal year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the Part-Time Grant program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned a prior associate or baccalaureate degree (or equivalent), which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.

INSTITUTIONAL ALLOCATIONS

- **Base Allocation:** Participation in the Part-Time Grant Program is optional. Part-Time Grant funds will be allocated based on a formula that considers a rolling three-year

average of the institutions' Pell Grant Program expenditure for Part-Time Massachusetts residents.

- **Supplemental Allocation:** Supplemental allocation may be granted to an eligible institution demonstrating the need for additional funds.
- **De-obligation/Reallocation:** Institutions must de-obligate any unused/uncommitted funds on or before December 1st of each year. Subject to the availability of de-obligated resources, the Senior Deputy Commissioner for Access and of Student Financial Assistance may re-allocate Part-Time Grant funds.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

- **Bachelor's Degree:** Maximum of 7 years, 14 semesters for part-time (minimum of 6 enrolled credits per academic term)
- **Associate's Degree:** Maximum of 5 years, 10 semesters for part-time (6 enrolled credits minimum per academic term)
- **Certificate Program:** Maximum of 8 semesters

AWARD VALUE

Awards made under this program must be calculated based on the award schedule provided for part-time grants. Individual awards for an academic year may not exceed a student's demonstrated financial need.

NOTE: This Program does not preclude the institution from providing additional funds to meet the student's remaining need.

INSTITUTIONAL DISBURSEMENT OF FUNDS

One hundred percent of the funds allocated shall be used for awards to students. Funds must be awarded to students during the traditional academic year.

Unexpended/uncommitted funds shall be returned to the Board of Higher Education for re-allocation to other institutions no later than December 1 of each year. All funds must be disbursed by June 30.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Part-Time Grant. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts

Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Part-Time Grant must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Part-Time Grant.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Part-Time Grant. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

IX. Cash Grant

BOARD OF HIGHER EDUCATION CASH GRANT PROGRAM

PURPOSE

A founding principle of the Tuition 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 Cash Grant Program was designed to assist needy students in meeting institutionally held charges such as mandatory fees and non-state-supported tuition. It is a complementary program to the Need-Based Tuition Waiver Program. The Cash Grant is designed as an offset of the Tuition Waiver Program for the purpose of providing financial support to those individuals who would be denied the opportunity for higher education, without such assistance. Since its inception, the Cash Grant has been utilized as supplemental grants in campus-based financial aid packaging strategies, representing an important mechanism for public institutions to assist needy students.

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 grant eligibility to students enrolled in non-state supported degree or certificate programs. The institutional definition of "certificate" program shall apply.

ELIGIBILITY REQUIREMENTS

To be eligible for the Cash Grant program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled

term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;

- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) enroll for at least three undergraduate credits per semester in an eligible program;
- h) have not earned a bachelor's degree (or the equivalent); and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

INSTITUTIONAL ALLOCATION:

- a) **Base Allocation:** The base allocation of Cash Grant is calculated using the same methodology as the Need-Based Tuition Waivers. Allocations are determined by a formula which utilizes three-year average enrollment and financial aid data.
- b) **De-obligation/Reallocation:** On or before November 1 of each year, institutions may request the Commissioner to reallocate any unused/uncommitted Cash Grant funds that are released by other institutions. Subject to the availability of de-obligated resources, the Commissioner may reallocate Cash Grant resources on or before December 31.

STUDENT ELIGIBILITY BY STUDENT ENROLLMENT INTENSITY AND DEGREE

A student may receive a Cash Grant award if enrolled full or part-time (minimum of three credits) while enrolled in an approved certificate, associate or bachelor's degree at a public college or university.

AWARD VALUE

- a) Unless otherwise designated, an individual student Cash Grant award for an academic period may not exceed the combined institutional tuition and fees charged for the award period.
- b) Cash Grants, 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 the Cash Grant may be granted full or partial grants to cover direct charges, according to the institution's financial aid packaging policies.
- d) Cash Grants 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 Cash Grant awards via the financial aid award letter.

AWARD CALCULATION

Unless otherwise designated, all Cash Grants must be awarded based on demonstrated financial need as follows:

- a) Students qualifying for the Cash Grant must complete the institution's required application process for financial aid.
- b) Students selected by the U.S. Department of Education for verification must complete all required documentation prior to receipt of a Cash Grant.
- c) Awards made for Cash Grant Programs must be clearly documented in the student record for auditing purposes.

***Financial Need = Cost of Attendance (COA) minus Student Aid Index (SAI) =
Cash Grant award (award cannot exceed direct cost of tuition and fees)***

AWARD DISBURSEMENT

Cash Grant funds awarded to students must be credited to the student's account as designated under the institution's disbursement policy for the appropriate academic term. Disbursement must follow state and federal guidelines governing the disbursement of funds.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Cash Grant program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts

Department of Higher Education (DHE) or their designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All Massachusetts institutions receiving funds under the Cash Grant Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Cash Grant program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Cash Grant program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

X. Massachusetts Foster Child Grant Program

**BOARD OF HIGHER EDUCATION
MASSACHUSETTS FOSTER CHILD GRANT PROGRAM**

DEFINITIONS

ELIGIBLE INSTITUTION:

An eligible institution shall mean a public, private, independent, for profit or nonprofit institution in the Commonwealth of Massachusetts and the continental United States authorized to offer undergraduate degrees or certificate programs. The institution must be accredited and eligible to participate in Federal Title IV programs.

ELIGIBLE PROGRAM:

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

ELIGIBILITY REQUIREMENTS

To be eligible for the Foster Child Grant program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) have been placed in the custody of the Department of Children and Families through a Care and Protection Petition;
- d) be under the age of twenty-five (25) at the start of the academic year;
- e) have signed a voluntary agreement with the Department of Children and Families establishing the terms and conditions for receiving such aid;
- f) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law annually;
- g) enroll, as matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study;
- h) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;

- i) comply with financial aid verification requirements;
- j) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program; and
- k) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

AWARD VALUE

The award under this program shall be as follows:

- a) maximum of \$6,000 per academic year for eligible students enrolled in public institutions for no more than 5 consecutive years
- b) maximum of \$6,000 per academic year for students enrolled in private non-profit or private for-profit institutions for no more than 5 consecutive years. In all cases, funds must be awarded as "last dollar" grants, with eligibility determined after consideration of all other state, federal and institutional scholarship and grant resources. Institutions may not use the Foster Child Grant to supplant other state, federal or institutional aid previously awarded to the student. Wherever possible, institutions are encouraged to use the Foster Child Grant to reduce student education loan debt.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Foster Child Grant program, and that the student is enrolled in an approved certificate, associate or bachelor's degree program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the Foster Child Grant program.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Foster Child Grant program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions participating in the Foster Child Grant Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain adequate documentation of a recipient student's eligibility for the Foster Child Grant Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Foster Child Grant. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XI. Tuition Waivers

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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Need Based Tuition Waiver, the student must meet the following eligibility requirements:

- a) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education policy;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- c) not be in default of any federal student loans for attendance at any institution or owe a refund for any previous financial aid received;
- d) enroll for at least three undergraduate credits per semester in an eligible program;
- e) maintain satisfactory academic progress according to institutional standards developed for federal financial aid programs, with at least an annual review;
- f) has not earned a baccalaureate or professional degree;
- g) Complete the Free Application for Federal Student Aid (FAFSA), or another state-approved equivalent form, annually for consideration of assistance by any designated deadline, as may be determined by the Department of Higher Education, and comply with financial aid verification requirements in either the FAFSA or the alternative state-approved form, as applicable;

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024. For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity/>

NEED BASED TUITION WAIVER PROGRAM CONDITIONS

- **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.
- **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.
- **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.

AWARD VALUE

An individual student waiver for an award period may not exceed the actual campus tuition charge for the award period.

Tuition Waiver awards, in combination with other resources in the student's financial aid package, may not exceed the student's demonstrated financial need.

Students qualifying for a Tuition Waiver may be granted partial or full waivers depending upon the institution's financial aid packaging policies.

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Need Based Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated

annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Need Based Tuition Waiver must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Need Based Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Need Based Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 B. CATEGORICAL TUITION WAIVER

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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Categorical Tuition Waiver program, the student must meet the following eligibility requirements:

- a) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- c) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- d) be 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

² M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here:

<https://www.mass.edu/tuitionequity>

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.

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

CATEGORICAL TUITION WAIVER CONDITIONS

- An institution’s level of expenditure is determined by the value of the total number of Tuition Waivers granted to students in specific categories.
- 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).
- 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

Individual student awards for an award period may not exceed the actual campus tuition charges for the award period.

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.

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.

Students qualifying for a categorical tuition waiver may be granted full tuition waivers consistent with the institution's policies.

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Categorical Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Categorical Tuition Waiver program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Categorical Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Categorical Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 C. GRADUATE STUDENT TUITION WAIVER

DEFINITIONS:

ELIGIBLE INSTITUTION:

An institution within the system of public institutions 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Graduate Student Tuition Waiver program, the student must meet the following eligibility requirements:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law³ or otherwise
- d) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;

GRADUATE TUITION WAIVER PROGRAM CONDITIONS

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Graduate Student Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all

³ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Graduate Student Tuition Waiver program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Graduate Student Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Graduate Student Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 D. MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY – PREPAID TUITION PROGRAM WAIVERS

DEFINITIONS:

ELIGIBLE INSTITUTION:

An 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.

MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY:

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

PREPAID TUITION PROGRAM:

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

TUITION CREDITS:

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

ELIGIBILITY REQUIREMENTS

To be eligible for the Massachusetts Educational Authority (MEFA) Prepaid Tuition Waiver program, the student must meet the following eligibility requirements:

- a) be enrolled in an eligible institution, as defined;
- b) be an owner or a qualifying beneficiary of a MEFA Prepaid Tuition Program;
- c) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually; and
- d) comply with financial aid verification requirements.

MEFA PREPAID TUITION PROGRAM WAIVER CONDITIONS

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 MEFA Prepaid Tuition Program.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the

Massachusetts Educational Authority (MEFA) Prepaid Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Massachusetts Educational Authority (MEFA) Prepaid Tuition Waiver must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Massachusetts Educational Authority (MEFA) Prepaid Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Massachusetts Educational Authority (MEFA) Prepaid Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the *MassTransfer* Tuition Waiver program, the student must meet the following eligibility requirements:

- a) enrolled in a state college or University and 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.
- b) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards and meet the minimum required 3.0 Grade Point Average (GPA) for continued eligibility;
- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- d) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- f) comply with financial aid verification requirements;
- g) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the *MassTransfer* Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the *MassTransfer* Tuition Waiver Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the *MassTransfer* Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the *MassTransfer* Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 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 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 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 Universities and who have pursued other endeavors for a minimum of five years are eligible to apply to a State University for the Paul Tsongas Scholarship Program under the exceptional life experience category set forth in the Guidelines.

STATE UNIVERSITY 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 Universities, as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBILITY REQUIREMENTS

To be eligible for the Paul Tsongas Scholarship Program Tuition Waiver, the student must meet the following eligibility requirements:

- a) be enrolled in an eligible institution, as defined;
- b) maintain a G.P.A. of 3.3 for continued eligibility for the Paul Tsongas Scholarship Program Tuition Waiver for four years of study;
- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- d) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually; and

- f) comply with financial aid verification requirements.

PAUL TSONGAS SCHOLARSHIP PROGRAM TUITION WAIVER CONDITIONS

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

PARTICIPATION AGREEMENT

All institutions receiving funds under the Paul Tsongas Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each State University to maintain documentation of a recipient student's eligibility for the Paul Tsongas Scholarship Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Paul Tsongas Scholarship program. OSFA will establish the timeline, specifications, 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 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 G. WASHINGTON CENTER PROGRAM

PURPOSE

This program provides financial assistance to support Massachusetts students who are enrolled in an eligible public higher education institution and are selected to participate in immersive internships and academic seminars offered by The Washington Center for Internships and Academic Seminars (a nonprofit organization). As set forth below, subject to available funding, this program offers tuition waivers and scholarship funding to eligible students. M.G.L. c. 15A, §§ 16 and 19. This initiative seeks to enable students to explore their interests, gain valuable career insights, and build a pathway to their professional futures. By inspiring students to become informed, socially engaged citizens, this partnership seeks to empower the next generation of leaders across diverse fields, ultimately enhancing the vibrancy and sustainability of our communities.

DEFINITIONS

ELIGIBLE INSTITUTION:

The nine Massachusetts State Universities and the four undergraduate campuses of the University of Massachusetts as identified in Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE PROGRAM

The Academic Internship Program (AIP): A semester long or summer term program offered by the Washington Center.

Short Term Programs (STP): Short-term programs and academic seminars offered by The Washington Center. A full list and description of the eligible programs is accessible here: <https://twc.edu/upcoming-short-term-experiences>

ELIGIBILITY REQUIREMENTS

To be eligible for the Washington Center program, the student must:

- a) be enrolled in a degree program at an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;

- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned a prior bachelor's degree, or the equivalent;
- h) Have obtained a minimum 3.0 cumulative Grade Point Average (GPA)
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards; and
- j) meet other eligibility criteria as established by the institution and The Washington Center.

AWARD VALUES

The Academic Internship Program (AIP):

- A waiver of tuition by the Board of Higher Education along with a waiver of mandatory fees by the institution, to cover the costs of the credits earned by the student for participating in The Washington Center's Academic Internship Program.
- A program fee and housing scholarship in the amount of \$7,700, to reduce the student's cost to participate in The Washington Center Academic Internship Program.
 - The student may be eligible for additional scholarship funding from The Washington Center in an amount funded and determined by The Washington Center.

The Short Term Programs (STP):

Subject to appropriation and available funding, a scholarship ranging from \$1,000 to \$3,000 per program to support the student's participation in the STP experience. The amount of the BHE-funded scholarship is intended to fully cover the student's program fee and housing costs, as set by The Washington Center for each STP. In fiscal years where there may be a funding shortfall, the student may be eligible for a matching scholarship from The Washington Center in an amount funded and determined by The Washington Center.

NUMBER OF AWARDS

Each eligible institution may provide nine new Washington Campus Tuition Waivers per academic year for the AIP program; 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 Program award recipients. Additional eligibility criteria shall be filed with the Board of Higher Education upon adoption and upon any amendments thereto.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Washington Center Tuition Waiver Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Washington Center Tuition Waiver Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each State University to maintain documentation of a recipient student's eligibility for the Washington Center Tuition Waiver Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Washington Center Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 H. UNIVERSITY OF MASSACHUSETTS ACADEMIC AND ARTISTIC TALENT PROGRAM

DEFINITIONS

ELIGIBLE INSTITUTION:

The five campuses of the University of Massachusetts.

ELIGIBLE PROGRAM:

An approved degree program offered by the University of Massachusetts.

ELIGIBILITY REQUIREMENTS

To be eligible for the University of Massachusetts Academic and Artistic Talent program, the student must meet the following eligibility requirements:

- a) enrolled in a degree program at the University of Massachusetts;
- b) eligibility criteria as established by the University of Massachusetts.

MASSACHUSETTS ACADEMIC AND ARTISTIC TALENT PROGRAM CONDITIONS

- 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.

AWARD VALUE:

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

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the University of Massachusetts Academic and Artistic Talent program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the University of Massachusetts Academic and Artistic Talent Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the University of Massachusetts Academic and Artistic Talent program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the University of Massachusetts Academic and Artistic Talent program. OSFA will establish the timeline, specifications, 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 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 I. UNIVERSITY OF MASSACHUSETTS EXCHANGE PROGRAM

DEFINITIONS

ELIGIBLE INSTITUTION:

The five 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) Eligibility criteria as established by 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the University of Massachusetts Exchange Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the University of Massachusetts Exchange Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the University of Massachusetts Exchange Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the University of Massachusetts Exchange Program. OSFA will establish the timeline, specifications, 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 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 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the University of Massachusetts Athletic Program Tuition Waiver. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the University of Massachusetts Athletic Program Tuition Waiver must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the University of Massachusetts Athletic Program Tuition Waiver.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the University of Massachusetts Athletic Program Tuition Waiver. OSFA will establish the timeline, specifications, 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 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 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Cooperative Association of States for Scholarships (CASS) Program Tuition Waiver. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Cooperative Association of States for Scholarships (CASS) Program Tuition Waiver must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Cooperative Association of States for Scholarships (CASS) Program Tuition Waiver.

- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Cooperative Association of States for Scholarships (CASS) Program Tuition Waiver. OSFA will establish the timeline, specifications, 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Incentive Program for Aspiring Teachers, the student must meet the following eligibility requirements:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) be in their third and/or fourth year enrolled in state approved teacher education programs in fields with teacher shortages;
- h) have a cumulative 3.0 grade point average in general education courses; and
- i) commit 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.

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Incentive Program for Aspiring Teachers. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Incentive Program for Aspiring Teachers must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Incentive Program for Aspiring Teachers.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Incentive Program for Aspiring Teachers. OSFA will establish the timeline, specifications, 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 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 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 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 they are 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Collaborative Teachers Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of

Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Collaborative Teachers Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Collaborative Teachers Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Collaborative Teachers Program. OSFA will establish the timeline, specifications, 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 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 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 they have successfully completed that year's teaching responsibilities.
- 2) The teacher shall be responsible for submitting the required materials to the campus where they will enroll. The teacher must also provide evidence to the campus that they have 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Career Advancement Program. Institutions that have signed an agreement to participate in the

Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Career Advancement Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Career Advancement Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Career Advancement Program. OSFA will establish the timeline, specifications, 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the High Technology Scholar/Intern Tuition Waiver program, the student must:

- a) be enrolled in an eligible program at an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the High Technology Scholar/Intern Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the High Technology Scholar/Intern Tuition Waiver program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the High Technology Scholar/Intern Tuition Waiver program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the High Technology Scholar/Intern Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 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 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.

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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Department of Children and Families (DCF) Adopted Children Tuition Waiver and Fee Assistance program, the student must:

- a) have been in the custody of the Department of Children and Families and
 - a. was adopted by an eligible Massachusetts state employee through the Department of Children and Families; or
 - b. was adopted by an eligible Massachusetts resident through the Department of Children and Families;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law⁴ or otherwise;
- c) be under the age of twenty-five (25) at the start of the academic year;
- d) enroll in an undergraduate degree, certificate or short-term certificate program, or is taking noncredit courses;
- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- f) not be 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) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- h) have not earned a bachelor's degree or its equivalent; and
- i) comply with financial aid verification requirements.

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.

⁴ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity/>

Wherever possible, institutions are encouraged to use the Tuition and Fee Assistance Program to reduce student education loan debt.

AWARD DISBURSEMENT

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Department of Children and Families (DCF) Adopted Children Tuition Waiver and Fee Assistance program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving the Department of Children and Families (DCF) Adopted Children Tuition Waiver and Fee Assistance funds for eligible Adopted Children must have an active State Financial Aid Participation Agreement on file with the Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Department of Children and Families (DCF) Adopted Children Tuition Waiver and Fee Assistance program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Department of Children and Families (DCF) Adopted Children Tuition Waiver and Fee Assistance program. OSFA will establish the timeline, specifications, 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 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Department of Children and Families (DCF) Foster Children Tuition Waiver and Fee Assistance program, the student must:

- a) have been in the custody of the Commonwealth before age 18;
- b) Be 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;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the

Massachusetts Tuition Equity Law⁵ or otherwise;

- d) be under the age of twenty-five (25) at the start of the academic year;
- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- f) enroll in an undergraduate degree, certificate or short-term certificate program, or take noncredit courses;
- g) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- h) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- i) have not yet received a bachelor's degree or its equivalent;
- j) comply with financial aid verification requirements.

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.

AWARD DISBURSEMENT

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

⁵ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity/>

funds in compliance with guidelines governing all state financial aid programs.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Department of Children and Families (DCF) Foster Children Tuition Waiver and Fee Assistance program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving the Department of Children and Families (DCF) Foster Children Tuition Waiver and Fee Assistance funds for eligible Foster Children must have an active State Financial Aid Participation Agreement on file with the Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS:

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Department of Children and Families (DCF) Foster Children Tuition Waiver and Fee Assistance program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Department of Children and Families (DCF) Foster Children Tuition Waiver and Fee Assistance program. OSFA will establish the timeline, specifications, 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Stanley Z. Koplik Certificate of Mastery Tuition Wavier program, the student must:

- a) have graduated from a Massachusetts high school and awarded a Certificate of Mastery by the Massachusetts Department of Education;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- c) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually; and
- d) comply with financial aid verification requirements.

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 and must 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Stanley Z. Koplik Certificate of Mastery Tuition Wavier program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Stanley Z. Koplik Certificate of Mastery Tuition Wavier program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Stanley Z. Koplik Certificate of Mastery Tuition Wavier program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Stanley Z. Koplik Certificate of Mastery Tuition Wavier program. OSFA will establish the timeline, specifications, 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Valedictorian program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) Have been designated by a public or private high school in the state as a valedictorian; and
- h) Meet the eligibility criteria as established by the public higher education institution for this program.

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Valedictorian program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Valedictorian program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- c) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Valedictorian program.
- c) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Valedictorian program. OSFA will establish the timeline, specifications, 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 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 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 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Commonwealth September 11, 2001 Tuition Waiver program, the student must:

- 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;
- b) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- c) comply with financial aid verification requirements; and
- d) provide the following documents 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.

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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Commonwealth September 11, 2001 Tuition Waiver program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Commonwealth September 11, 2001 Tuition Waiver program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- c) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Commonwealth September 11, 2001 Tuition Waiver program.
- c) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Commonwealth September 11, 2001 Tuition Waiver program. OSFA will establish the timeline, specifications, 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 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 U. 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.

ELIGIBILITY REQUIREMENTS

To be eligible for the Children of Fallen Service Member Waiver program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) have not earned a bachelor's degree (or the equivalent);
- g) enroll, as a matriculated student, on a full-time or part-time basis in an eligible program of study;
- h) be 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:
 - a. 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
 - b. 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; and
- c. was a resident of the Commonwealth of Massachusetts at the time of entry and remained a Massachusetts resident throughout full-time military service.
- i) present to the institution, documentation of eligibility for this program, as specified; and
- j) 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.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Children of Fallen Service Member Waiver. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all

students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Children of Fallen Service Member Waiver must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- c) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Children of Fallen Service Member Waiver.
- c) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Children of Fallen Service Member Waiver. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XII. Tomorrow's Teachers Scholarship

BOARD OF HIGHER EDUCATION TOMORROW'S TEACHERS SCHOLARSHIP PROGRAM

PURPOSE

The Tomorrow's Teachers Scholarship Program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature M.G.L. c. 15A, Section 16. The program provides financial assistance to qualified high school and currently enrolled college students and is purposed to attract and encourage a diverse population of applicants to teach in the Massachusetts public school system. The scholarship is designed to provide financial assistance for tuition, fees, and related educational costs, as calculated by the institution in the Cost of Attendance (COA), for a bachelor's degree or post-baccalaureate coursework at an eligible public institution of higher education in the Commonwealth, that meets the certification requirements for employment at a Massachusetts public elementary or secondary school. This program is subject to appropriation.

DEFINITIONS

ELIGIBLE INSTITUTION:

A 4-year public institution within the public system of higher education under Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBLE PROGRAM:

Any undergraduate degree program or post-baccalaureate coursework in an approved educator preparation program at a 4-year public institution within the public system of higher education under Section 5 of Chapter 15A of the Massachusetts General Laws.

ELIGIBILITY REQUIREMENTS

To be eligible for the Tomorrow's Teachers Scholarship Program, the student must:

- a) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education policy;
- b) be enrolled in an eligible institution, as defined;
- c) be a U.S. Citizen, permanent legal resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state Student Loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned prior baccalaureate degree, or the equivalent, except for those pursuing or intending to pursue post-baccalaureate course work in an approved educator preparation program at a Massachusetts 4-year public institution of higher education;
- h) enroll as a matriculated student, in an undergraduate or post baccalaureate degree program, full-time (minimum of 12 credits, or the equivalent), unless otherwise agreed upon, in an approved course of study that meets the licensure requirements for employment at a Massachusetts public elementary or secondary school; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards; and
- j) not be a recipient of funds under any of the following financial aid workforce programs: Behavioral Health Workforce Scholarship, High Demand Scholarship, Early Childhood Educators Scholarship, or the Paraprofessional Grant. Students who simultaneously apply and meet eligibility criteria for more than one of these workforce programs shall only be determined eligible for one program.

SCHOLARSHIP CONDITIONS AND RECIPIENT RESPONSIBILITIES

- Complete the scholarship application and sign a promissory note, annually, for continuation of scholarship funds.
- Provide an official transcript at the conclusion of each academic year to confirm continued eligibility requirements for program of study and progress towards degree completion. Incoming first-year students are required to submit a declaration of their major from the institution's registrar's office.
- Sign a scholarship agreement to "obtain the appropriate certification in accordance with section 38G of chapter 71" and "commit to teaching for 4 years in a school district, as defined in section 2 of chapter 70, in the commonwealth." Failure to complete the

required 4-year teaching service will result in a repayment of funds as defined in the agreement.

- Become employed as a teacher of record, within 12 months of degree completion or the completion of post-baccalaureate course work in an approved educator preparation program
- Annually provide proof of employment to document fulfillment of the service obligation
- Acknowledge that this scholarship is considered repayment through service and in absence of fulfilling that commitment, the scholarship reverts to a loan that must be repaid by the scholarship recipient, per the terms of the Scholarship Promissory Note.
- Acknowledge the set forth repayment through service schedule, that one year of teaching will forgive one year of scholarship.

AWARD VALUE

Subject to appropriation, the academic year award amount for eligible applicants under this program shall not exceed \$25,000 per student, as determined annually by the Department of Higher Education. The scholarship may be used to cover educational expenses included in the COA, as calculated by the institution. This may include, but is not limited to, tuition, fees, room and board, books and supplies, transportation, childcare, and personal expenses, for a bachelor's degree program or post-baccalaureate coursework.

Students at the undergraduate level may receive scholarship funds for up to a maximum of 4 years, 8 semesters (120 credits). An additional year of scholarship assistance may be awarded based on extenuating circumstances, with an approval of a written appeal.

Students pursuing post baccalaureate coursework may receive scholarship funds for up to a maximum of 3 semesters.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded Tomorrow's Teachers Scholarship funds as follows:

Bachelor's Degree

Full-time	Maximum of 4 years, 8 semesters (120 credits) for full-time (minimum of 12 enrolled credits per academic term).
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Post Baccalaureate Coursework

Part-time	Maximum of 3 semesters (6 – 11 enrolled credits per academic term)
Full-time	Maximum of 3 semesters (minimum of 12 enrolled credits per academic term)

AWARD CALCULATION

All students who meet the eligibility requirements and are enrolled in an undergraduate program or post-baccalaureate coursework, in an approved educator preparation program may receive a Tomorrow's Teachers Scholarship award to cover Financial Unmet Need for costs associated educational expenses calculated in a student's COA (Cost of Attendance). Scholarship calculations for an eligible student is as follows:

Tomorrow's Teachers Scholarship Award (not to exceed \$25,000 per academic year)= Cost of Attendance **(minus)** Total Grant Aid

**Grant Aid: Total Federal Aid, Total Institutional Aid, Total State Aid, and Total Outside Aid*

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Tomorrow's Teachers Scholarship Program, and that the student is enrolled in an approved educator preparation program.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the Tomorrow's Teachers Scholarship Program.

Additionally, disbursement of awards will not be made until the student's signed promissory note has been received and approved.

Forfeiture of Scholarship Award:

Recipients of the Tomorrow's Teachers Scholarship Program who fail to complete their teaching obligation, are required to repay all scholarship funds, as outlined in the promissory note.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Tomorrow's Teachers Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated

annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Tomorrow's Teachers Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Tomorrow's Teachers Scholarship Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Tomorrow's Teachers Scholarship Program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XIII. Gilbert Grant

**BOARD OF HIGHER EDUCATION
GILBERT MATCHING SCHOLARSHIP GRANT PROGRAM**

PURPOSE

The purpose of the Gilbert Matching Scholarship (GMSGP) is to make funds available to participating Massachusetts independent institutions of higher education and schools of nursing. One hundred percent must be used for direct financial assistance to needy Massachusetts undergraduate students to enable such students to attend or continue to attend such institutions.

DEFINITIONS:

ACADEMIC YEAR:

Shall mean the period between July 1 of one year and June 30 of the subsequent year.

ACT:

Shall mean the General Appropriation Act for a fiscal year.

COMMISSIONER:

Shall mean the Commissioner of the Department of Higher Education appointed pursuant to M.G.L. c. 15A s.4.

ELIGIBLE INSTITUTION:

Shall mean an institution of higher education in the Commonwealth of Massachusetts which:

- a) admits as regular students only persons having a certificate of graduation from a school providing secondary education or the recognized equivalent of such a certification, and
- b) is legally authorized within the Commonwealth to provide a program of post-secondary education, and
- c) provides an education for which it awards an associate or bachelor's degree and is accredited by the New England Association of Schools and Colleges, or
- d) provides an education which results in an award of a diploma indicating satisfactory completion of a hospital school of professional nursing program which is accredited by the National League of Nursing, and is approved by the State Board of Registration in Nursing
- e) is not a public higher educational institution operated by the Commonwealth or its subdivisions and does not drive the major portion of its annual budget from

state or local appropriations, and

- f) does not have as its primary purpose education for religious purposes.

STUDENT AID INDEX:

Shall mean the amount the parent, student and/or the student's spouse are able to contribute to educational expenses as determined by the Free Application for Student Financial Aid (FAFSA), or an alternative application designated by the Board of Higher Education

INSTITUTIONAL FUNDS:

Shall mean funds derived from institutional sources such as endowments, scholarship funds or operating funds but not including funds derived from federal grants, loan funds, state scholarship funds or work study and other similar funds.

ELIGIBILITY REQUIREMENTS

To be eligible for the Gilbert Matching Scholarship program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned a bachelor's degree (or the equivalent);
- h) Demonstrate financial need in accordance with guidelines, as specified;

- i) enroll, as a matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study; and
- j) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

FORMULA FOR ALLOCATION OF FUNDS

From the sums appropriated in each fiscal year, the Commissioner shall allocate to each participating institution a share of the total GMSGP funds. This share shall be based on a formula that considers the amount of institutional money expended by the institution in the prior academic year, or a three-year average, for scholarship grant aid to needy Massachusetts full-time undergraduate students and the annual appropriation of GMSGP funds. No participating institution shall be allocated more than ten percent of the annual GMSGP allocation, or the amount that is expended from institutional funds in the prior academic year for scholarship aid to needy Massachusetts full-time undergraduate students.

- 1) The Commissioner or his/her designee(s) will review applications for conformity with these Guidelines and determine the amount to be allocated to the participating institutions.
- 2) The Commissioner may require each participating institution receiving an allocation under this program to submit a report prior to April 30 of each fiscal year projecting the portion, if any, of such allocation that will not be used for scholarship aid disbursements for that academic year. Allocations not expended by the participating institutions during the academic year shall be returned to the Board of Higher Education.
- 3) GMSGP funds shall not be allocated or if allocated shall be repaid to the Commonwealth unless disbursed in accordance with these guidelines.
- 4) The Commissioner will notify each participating institution which has filed an application of its grant award no later than ninety (90) days after passage of the Gilbert Matching Scholarship Grant (GMSGP) appropriation, or July 1, whichever is later.

GILBERT GRANT CONDITIONS

- 1) Any eligible institution wishing to obtain a grant under this program shall file an application with the Commissioner annually which shall contain the following information and such information and assurances as the Commissioner shall from time to time require:

- a) the total amount of actual expenditures made from institutional money for scholarship aid to needy Massachusetts full-time undergraduate students during the previous academic year;
 - b) the number of full-time undergraduate students in the previous academic year, the number of all Massachusetts residents enrolled as Massachusetts full-time undergraduates in the previous academic year, the number of Massachusetts full-time undergraduates receiving scholarship aid from the institutions during the previous academic year;
 - c) an assurance that the institution will continue to be an institution of higher education or school of nursing as defined herein for the next academic year;
 - d) an assurance that the institution will expend an amount equal to one hundred percent of the grant received in scholarship aid to needy Massachusetts full-time undergraduate students;
 - e) an assurance that funds for administration and support of the GMSGP do not constitute expenditures from the amount allocated for scholarship aid;
 - f) an assurance that no portion of the scholarship aid grant shall be used directly or indirectly to reduce the institution's expenditure of institutional funds;
 - g) the criteria and procedures used in determining financial need in selecting GMSGP recipients and in determining the amount of the GMSGP award;
 - h) the name, address, telephone number of the chief operating officer, the financial aid administrator and the person completing the application, and the signature of the person completing the application.
 - i) If an eligible institution does not wish to participate in the GMSGP, the institution shall so state in writing to the Commissioner on a form furnished by the Commissioner
- 2) Applications shall be filed with the Commissioner annually.
- 3) The Commissioner shall upon request require the applicant to make available for production and inspection by the Commissioner or his designee(s) any documents which support statements made in the application.

INSTITUTIONAL DISBURSEMENT OF GRANT

- 1) Each participating institution shall spend one hundred percent, or a percentage as determined by the legislature, of the GMSGP grant received for scholarship aid to needy Massachusetts students.
- 2) To comply with these Guidelines, the GMSGP scholarships fund shall:
 - a) not be awarded more than \$2,500 per academic year for any student; with a minimum award not less than \$200.
 - b) be awarded only in increments of \$100;
 - c) be administered by the institution's existing financial aid or scholarship office;
 - d) be received and disbursed from a separate financial aid account.
- 3) All GMSGP funds must be administered with such fiscal control and accounting procedures as are required herein and as may be required from time to time by the Commissioner.

DETERMINATION OF NEED

- 1) The institution may use the Federal Methodology to calculate financial need, or any system that produces results consistent with the Federal Methodology and is approved or designated by the Board of Higher Education.
- 2) No student may be considered to have need unless the total educational expenses are at least \$500 greater than the student's total resources as determined by Federal Methodology
- 3) The total education expense and the total Student Aid Index shall be determined in accordance with federal aid standards.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Gilbert Grant program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or their designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All Massachusetts institutions receiving funds under the Gilbert Grant Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Gilbert Grant program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Gilbert Grant program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XIV. Paraprofessional Teacher Preparation Grant

**BOARD OF HIGHER EDUCATION
PARAPROFESSIONAL TEACHER PREPARATION GRANT**

PURPOSE

The Paraprofessional Teacher Preparation Grant Program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature M.G.L. c. 15A, Section 16. The program financial assistance to Massachusetts residents who are currently employed as paraprofessionals in Massachusetts public schools and wish to become licensed as full-time teachers. This grant is designed to reduce their financial burden and help address the Commonwealth's current teacher shortage. Financial need is not a requirement for the Paraprofessional Teacher Preparation Grant. However, recipients must annually file the Free Application for Federal Student Aid (FAFSA).

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 or any regionally accredited private or independent college or university in the Commonwealth of Massachusetts that offers a teacher preparation program leading to licensure, approved by the Massachusetts Department of Education (MDOE); or a two-year college that has a signed articulation or joint admissions agreement with a four-year college or university for a teacher preparation program.

ELIGIBLE PROGRAM:

Any undergraduate baccalaureate degree program, offered by an eligible institution, with a teacher preparation program approved by the Massachusetts Department of Education or a program at a two-year college with a signed articulation or joint admissions agreement with an institution offering an MDOE approved program.

ELIGIBILITY REQUIREMENTS

To be eligible for the Paraprofessional Teacher Preparation Grant program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;

- c) be a U.S. Citizen, permanent legal resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- d) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- e) have worked, and continue to work, as a paraprofessional in a public school in the Commonwealth of Massachusetts for a minimum of two years or be employed as a paraprofessional and be enrolled in and pursuing courses of study that will lead to certification as a teacher in bilingual education, special education, math, science, or foreign language, while working as a paraprofessional in a public school in the Commonwealth;
- f) maintain eligible employment for a minimum of twenty hours per week, while enrolled full or part-time in an eligible undergraduate program of study;
- g) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- h) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- i) comply with financial aid verification requirements;
- j) complete a minimum of credits each academic year as part of the application for renewal of the grant;
- k) provide documentation to the Office of Student Financial Assistance of compliance with required program of study and academic progress, as requested;
- l) sign an agreement to teach in a public school in the Commonwealth of Massachusetts upon graduation and certification in accordance with section 38G of Chapter 71 M.G.L;
- m) have not earned a baccalaureate or professional degree, or the equivalent; and
- n) not be a recipient of funds under any of the following financial aid workforce programs: Tomorrow's Teachers Scholarship, High Demand Scholarship, Early Childhood Educators Scholarship, or the Behavioral Health Workforce Scholarship. Students who

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

simultaneously apply and meet eligibility criteria for more than one of these workforce programs shall only be determined eligible for one program.

AWARD VALUE

The award under this program will vary depending on the type of institution and number of enrolled credits. A recipient must be enrolled in a minimum of 3 credits:

Community College Students

Up to \$350 per credit – not to exceed a maximum of \$6,300 per academic year or \$3,150 per semester

State University Students

Up to \$550 per credit – not to exceed a maximum of \$9,900 per academic year, or \$4,950 per semester

Independent College or Public University Students

Up to \$750 per credit - not to exceed a maximum of \$13,500 per academic year, or \$6,750 per semester

Awards may not exceed the recipient's cost of attendance for any academic term of study.

The Board of Higher Education will annually review the public university and college tuition and fee charges and adjust the program award values, as it deems necessary.

AWARD CALCULATION

All students who meet eligibility requirements and are enrolled in an eligible undergraduate program at an eligible institution, as defined, may receive a Paraprofessional Teacher Preparation Grant award. Grant calculations for an eligible student is as follows:

Paraprofessional Teacher Preparation Grant Award = Number of enrolled credits (**multiplied**) award amount per credit as determined by institution type

Credit values and maximum awards per academic year and semester:

Community College Students: Up to \$350 per credit – not to exceed maximum of \$6,300 per academic year or \$3,150 per semester

State University Students: Up to \$550 per credit – not to exceed a maximum of \$9,900 per academic year, or \$4,950 per semester

Independent College or Public University Students: Up to \$750 per credit - not to exceed maximum of \$13,500 per academic year, or \$6,750 per semester

TEACHING OBLIGATION

Recipients of the Paraprofessional Teacher Preparation Grant must sign a Terms and Conditions Statement acknowledging their obligation to provide service as a full-time teacher in a Massachusetts public school (K12). The service commitment will range from a minimum of two and a maximum of four years, depending on the number of semesters of grant assistance received.

Failure to provide the required service may result in a repayment of funds received, prorated on the length of service, as defined in the Terms and Conditions Statement and as determined by the Massachusetts Office of Student Financial Assistance.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Paraprofessional Teacher Preparation Grant Program and that the student is enrolled in an approved associate or bachelor's degree program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the Paraprofessional Teacher Preparation Grant Program.

Academic year awards will be disbursed in equal payments for the fall and spring semesters.

Grants may be awarded for summer terms only if funds are available, and to students who indicated summer credits on the annual PTPG application. All funds must be disbursed by June 30.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Paraprofessional Teacher Preparation Grant program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Paraprofessional Teacher Preparation Grant Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Paraprofessional Teacher Preparation Grant program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Paraprofessional Teacher Preparation Grant program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XV. Early Childhood Educator's Scholarship

**BOARD OF HIGHER EDUCATION
EARLY CHILDHOOD EDUCATORS' SCHOLARSHIP PROGRAM**

PURPOSE

The Early Childhood Educator's Scholarship program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature M.G.L. c. 15A, Section 16. The scholarship is designed to provide financial assistance for currently employed early childhood and out of school time educators and providers who enroll in a certificate, associate's, bachelor's, or master's degree program in Early Childhood Education, Child Development, Family Studies, Child Care Administration, or fields that directly name early child development and its specific areas of inquiry. The Early Childhood Educators Scholarship Program was funded as a pilot initiative by the Legislature for the purpose of increasing the quality and availability of teachers and care providers to work with young children and youth in inclusive settings including infant/toddler, preschool and school age programs.

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 or regionally accredited independent (private) college or university in the Commonwealth of Massachusetts offering an Early Childhood Education program of study or program in a related field.

ELIGIBLE PROGRAM:

An undergraduate associate's, bachelor's or master's degree program offered by an eligible institution in either Early Childhood Education, Child Development, Family Studies, Child Care Administration or fields that directly name child development as its areas of inquiry, meeting the following criteria:

- Demonstrated compliance with degree program standards as established and required by a regional program accrediting body, such as the New England Association of Schools and Colleges (NEASC), and meet program approval standards as defined by the Massachusetts Department of Higher Education;
- Is approved under Title IV standards by the US Department of Education, including all program locations;
- Not based on any paid commission, bonus, or other incentive payment – based directly or indirectly upon success in securing enrollments or financial aid – to any person or entity engaged in any student recruiting or admission activities or in making decisions regarding the awarding of Title IV or State funds; and
- Admissions standards require that students have earned a high school diploma or GED

- In cases where the institution has entered into an agreement with another institution (or entity), consortium, or organization to provide an educational program, the institution has ensured that the educational program contracted out is in compliance with any state or federal regulations

Participating institutions must respond to a Department of Higher Education's inquiry concerning institutional compliance with program eligibility requirements. Funds will not be disbursed to an institution's students until the inquiry has been satisfactorily completed, and the Department of Higher Education has determined that the institution is in compliance with all program guidelines.

ELIGIBILITY REQUIREMENTS

To be eligible for the Early Childhood Educator's Program, the student must:

- a) enroll, as a matriculated undergraduate or graduate degree student, on a full- or part-time basis (a minimum of 3 credits) in an eligible Early Childhood Education, Child Development, Family Studies, Child Care Administration program or fields that directly name early child development and its areas of inquiry;
- b) be enrolled in an eligible institution, as defined;
- c) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education policy;
- d) be a U.S. Citizen, permanent legal resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- e) be employed, for at least six months, as an educator or provider in an early education and care program or out of school time program that is licensed or authorized by the Massachusetts Department of Early Education and Care (EEC) and continue employment in this field while pursuing the approved course of study, or be a licensed family childcare provider and continues to work as an early educator in an early education and care program in Massachusetts; or be considered a "prospective student" which is defined as unemployed or not employed as an early education and care provider at a facility or program, licensed or funded by the Department of Early

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

Education and Care, but plan to enroll in an approved course of study as defined in the eligibility requirements of the ECE Scholarship.

- f) Prospective students must demonstrate they are seeking employment with an early education and care provider in the commonwealth and will have one year to secure eligible employment.
- g) Have maintained employment or have provided licensed family childcare for at least six months prior to receipt of grant funds and has provided documentation of such employment;
- h) have not earned a prior bachelor's degree (or the equivalent) if enrolled in an undergraduate program;
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- j) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- k) comply with financial aid verification requirements;
- l) sign an agreement to continue employment as an early educator or provider in the Commonwealth of Massachusetts, with the expectation that the student will continue to be employed in the Early Childhood Education field as an educator or provider in Massachusetts for six months per semester of scholarship receipt, not to exceed a two year maximum commitment upon graduation from an associate's degree program and a four year maximum commitment upon graduation from a bachelor's degree program; and
- m) not be a recipient of funds under any of the following financial aid workforce programs: Tomorrow's Teachers Scholarship, High Demand Scholarship, Behavioral Health Workforce Scholarship, or the Paraprofessional Grant. Students who simultaneously apply and meet eligibility criteria for more than one of these workforce programs shall only be determined eligible for one program.

Priority consideration will be given to eligible applicants recommended by an individual qualified to speak to their commitment and dedication to the field of early education and care.

AWARD VALUE

The award for eligible applicants under this program will vary depending on the type of institution and number of enrolled credits:

Community College Students

Up to \$350 per credit – not to exceed a maximum of \$3,150 per semester

State University Students

Up to \$550 per credit – not to exceed a maximum \$4,950 per semester

Independent College or Public University Students

Up to \$750 per credit - not to exceed a maximum of \$6,750 per semester

Grants may be awarded for a maximum of three courses per semester, and recipients must enroll in a minimum of three credits in a given academic semester to be awarded funds. Awards may not exceed the recipient's cost of attendance for any academic term. The Department of Higher Education shall establish the number of credits to be paid in any given semester and reduce awards in any given term or academic year, based on demand and available funds, as necessary.

The Department of Higher Education will annually review the tuition and fee charges at Massachusetts public colleges and the university and adjust the program award values, as it deems necessary.

AWARD CALCULATION

All students who meet eligibility requirements and are enrolled in an eligible undergraduate program at an eligible institution, as defined, may receive an Early Childhood Educators' Scholarship award. Scholarship calculations for an eligible student is as follows:

Early Childhood Educators' Scholarship Award = Number of enrolled credits
(multiplied) award amount per credit as determined by institution type

Credit values and maximum awards per academic semester:

Community College Students: Up to \$350 per credit – not to exceed a maximum of \$3,150 per semester

State University Students: Up to \$550 per credit – not to exceed a maximum of \$4,950 per semester

Independent College or Public University Students: Up to \$750 per credit - not to exceed a maximum of \$6,750 per semester

AWARD DISBURSEMENT

Participating institutions must certify that each recipient is eligible in accordance with guidelines established for the Early Childhood Educators' Scholarship Program and that the student is enrolled in an approved certificate, associate's, bachelor's, or master's degree program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the Early Childhood Educator's Scholarship program.

Academic year awards will be disbursed in equal payments for the fall and spring semesters or as calculated based on enrolled credits within the established limits for the fall and spring semesters.

Fall semester is defined as commencing September 1 and concluding on or before December 31. Spring semester is defined as commencing January 1 and concluding on or before May 31. An institution must request and obtain approval for non-conforming terms from the Massachusetts Department of Higher Education. The Massachusetts Department of Higher Education will inform participating institutions each year whether funding is available for summer enrollment in the program. Each course offered through the program during any of the above terms must fully conform to the institution's published standards that clearly define enrollment status levels and course length at the institution.

Grants may be awarded to eligible applicants for summer terms based on availability of funds, but only to those who indicated summer credits on the annual ECE application. All funds appropriated for this program must be expended by June 30 of each fiscal year or as otherwise determined by the Legislature.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Early Childhood Educators' Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Early Childhood Educators' Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Early Childhood Educators' Scholarship program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Early Childhood Educators' Scholarship program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XVI. One Family, Inc. Scholarship

**BOARD OF HIGHER EDUCATION
ONE FAMILY, INC. SCHOLARSHIP PROGRAM**

PURPOSE

The One Family Scholarship Program was established by the Massachusetts Legislature to assist heads of households to achieve their academic goals by offering the opportunity for a permanent path out of poverty through the pursuit of higher education. Recipients of this scholarship receive an integrated network of services through the non-profit organization, One Family, Inc., whose mission is to serve residents of the Commonwealth who are low-income and homeless or have experienced homelessness within the prior year.

DEFINITIONS

INSTITUTION:

A public, private, independent, for-profit or nonprofit postsecondary institution in the Commonwealth of Massachusetts authorized to offer undergraduate degrees or certificate programs. The institution must be accredited and eligible to participate in the Federal Title IV programs.

ELIGIBLE PROGRAM:

Any undergraduate degree or certificate program offered by an eligible institution.

ELIGIBILITY REQUIREMENTS

To be eligible for the One Family Scholarship Program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) qualify as a head-of-household, with children under age 18;
- c) be at risk of homelessness, based on federal poverty standards, or have experienced homelessness within the previous 12 months;
- d) be an active participant of One Family, Inc., services and activities, including the Leadership Seminar program;
- e) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- f) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;

- g) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- h) comply with financial aid verification requirements;
- i) enroll, as a matriculated student, on a full-time or part-time basis in an eligible undergraduate program of study; and
- j) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

AWARD VALUE

The scholarship under this program may be awarded as follows:

- Scholarships may be awarded to cover tuition and fees and related living expenses during the period of enrollment
- The value of the tuition and fee portion of the scholarship, in combination with other financial aid, may not exceed the recipient's cost of attendance as determined by the institution

AWARD DISBURSEMENT

Scholarship expenses paid on behalf of an eligible student shall be reimbursed to One Family, Inc. by the Board of Higher Education each semester, as invoiced.

One Family, Inc. must supply documentation to support student enrollment and living expenses and documentation to support matching requirements as stipulated by the Massachusetts Legislature. This information provided by One Family, Inc. to the Board of Higher Education shall include the name, Social Security Number, scholarship award, institution enrolled for each scholarship recipient to facilitate the reimbursement and reporting requirements to the Massachusetts Legislature. One Family, Inc. shall notify the Board of Higher Education of any changes to the recipient's scholarship award and enrollment status.

The Board of Higher Education may require One Family, Inc. to provide additional information to support the reimbursement of administrative and other expenses.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the One Family Scholarship Program. Institutions that have signed an agreement to participate in the

Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the One Family Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the One Family Scholarship Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the One Family Scholarship Program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XVII. GEAR UP Scholarship

BOARD OF HIGHER EDUCATION GEAR UP SCHOLARSHIP PROGRAM

PURPOSE

The Higher Education Amendments of 1998 launched GEAR UP, a national effort to encourage more young people to have high expectations, stay in school and study hard, and go to college. Through the Board of Higher Education, the Commonwealth of Massachusetts received a GEAR UP State Grant to provide early college awareness activities, improved academic support, information on paying for college, and scholarship. These guidelines establish the terms and criteria for awarding scholarships to GEAR UP participants as required by the United States Department of Education.

DEFINITIONS:

ELIGIBLE INSTITUTION:

An eligible institution is defined as a state-approved public, private, independent, for profit or nonprofit institution in the Commonwealth of Massachusetts authorized to offer undergraduate degrees, certificates or diploma programs and that is also approved by the U.S. Department of Education to administer Title IV programs. Massachusetts state-approved public, private, independent and non-profit institutions located in states that have reciprocity agreements with and approved by the Commonwealth (PA, VT, and the District of Columbia) and award associate and bachelor's degrees are also eligible to participate.

ELIGIBLE PROGRAM:

An eligible degree or certificate program offered by an eligible institution.

ELIGIBILITY REQUIREMENTS

To be eligible for the GEAR UP Scholarship Program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be fewer than 22 years of age at time of first scholarship award;
- d) have participated in the Early Intervention component of GEAR UP Massachusetts;
- e) have graduated from a Massachusetts public high school beginning in 2005;

- f) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations;
- g) be enrolled full- or part-time in an eligible program at an eligible institution;
- h) complete the Free Application for Federal Student Aid (FAFSA) annually;
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- j) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program; and
- k) have not reached the maximum number of semesters of eligibility under the program.

AWARD VALUE

- a) The minimum amount of the GEAR UP scholarship for each academic year shall not be less than the minimum Federal Pell Grant as published (Section 401, Federal Regs)
- b) GEAR UP scholarships may consist of awards from one or more state financial aid programs
- c) GEAR UP scholarships shall not be considered for the purpose of awarding other federal grant assistance, except in no case shall the total amount of the student financial assistance awarded to a student exceed such student's total cost of attendance
- d) GEAR UP scholarships may be awarded to eligible students for a maximum of one year or two semesters.

AWARD PROCEDURE

Beginning with the Class of 2005, the Board of Higher Education will annually identify participating GEAR UP Massachusetts students.

- a) Institutions will be required to certify the attendance of GEAR UP Massachusetts students in each fall and spring and provide information regarding the amount of financial aid awarded to these students from all sources.
- b) GEAR UP scholarship funds are disbursed to the institution in two payments for the fall and spring semesters for students for whom eligibility has been certified by the

institution.

- c) Payment of GEAR UP funds is sent directly to the institution from the Commonwealth's Comptroller's Office. One hundred percent of the GEAR UP Scholarship shall be used to credit the student's account.
- d) All refunds shall be sent to the Office of Student Financial Assistance and checks made payable to the Commonwealth of Massachusetts GEAR UP Scholarship Fund.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the GEAR UP Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the GEAR UP Scholarship program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the GEAR UP Scholarship program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the GEAR UP Scholarship program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XVIII. State University Internship Incentive Program

**BOARD OF HIGHER EDUCATION
STATE UNIVERSITY INTERNSHIP INCENTIVE PROGRAM**

PURPOSE

The State University Internship Incentive Program is an incentive program to promote and support increased university-level student participation in employer sponsored internships. This program will raise awareness and interest of a greater and more diverse community of students in career opportunities related to the student's academic program of study and contribute to increased program completion and institutional graduation requirements.

DEFINITIONS

ELIGIBLE INSTITUTION:

State universities within the system of public institutions of higher education as identified in Section 5(ii) of Chapter 15A of the Massachusetts General Laws. An eligible institution electing to participate in the State University Internship Incentive (SU-II) program is required to sign an Institutional Agreement with the Department of Higher Education, which outlines all responsibilities and requirements for the award of stipends to students in support of their participation in internship placements, as outlined in these guidelines.

INTERNSHIP:

A supervised work-based learning experience for Massachusetts state university-level students intended to develop awareness and stimulate interest in fields of work and careers. Such work placement shall relate directly or indirectly to the student's academic program of study and be designed to impart relevant knowledge and skills reflected in requirements to enter a range of possible careers.

Internships for this program may be compensated or not, consistent with U.S. Department of Labor requirements.

[Http://www.dol.gov/whd/regs/compliance/whdfs71.htm](http://www.dol.gov/whd/regs/compliance/whdfs71.htm).

STIPEND:

A sum of money provided to a student for financial assistance to offset costs directly associated with participation in an approved internship, including tuition, fees, and/or related educational or student support expenses (e.g. travel expenses to and from the externship site) necessary for participation in the internship program.

ACADEMIC PROGRAM AND INTERNSHIP ELIGIBILITY

- Any state-supported undergraduate degree or certificate program offered by an eligible institution qualifies for this program.

- Internships must be directly or indirectly related to a student's program of study and must be approved in advance by a faculty supervisor in regard to the relevance of the learning objectives to the student's course of study.
- Internships shall qualify for academic credit recognized by the academic department governing the student's program of study. The amount of the credit award shall be determined by the governing academic department. The award of credit shall be based upon successful completion of the work requirements defined by the sponsor organization and the learning expectations defined by the academic institution.
- The duration of a qualifying internship shall be no shorter than any defined academic term or session to qualify for credit award. The internship may be scheduled to begin or end at times that are outside of but adjacent to the scheduled academic term or session to accommodate the sponsor's work schedules, e.g. a summer internship following the spring academic term or prior to the fall term or a winter inter-session.
- Student learning progress during the internship shall be monitored by a faculty supervisor in collaboration with the sponsor organization's internship site supervisor. Specific obligations of the employer to plan the internship and supervise and evaluate the student's successful completion of the internship shall be defined in an institutional agreement between the university and employer.
- Priority shall be given to internship sites located within the Commonwealth. Internships in Massachusetts based businesses and industries will promote future employment opportunities for students, better align the curriculum of our academic programs with the needs of key industry sectors and address the workforce needs of local employers for a highly skilled and educated workforce.
- Specific programs that regularly provide specialized student internships in out-of-state placement are also eligible for this program. Individual exceptions may be approved by the governing academic department when the exception offers a uniquely valuable and relevant workplace experience for students that cannot be readily attained within the Commonwealth.
- To promote broad student participation in internships across academic departments, no single academic program shall represent more than 50% of the institution's available funds for this purpose.
- International internship placements are not eligible for student stipends from this program.
- Eligible institutions electing to participate in the State University Internship Incentive (SU-II) program are required to sign an Institutional Agreement which outlines all responsibilities and requirements for the awarding of funds, student support services, and data sharing with the Department of Higher Education.

ELIGIBILITY REQUIREMENTS

To be eligible for the State University Internship Incentive Program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned a bachelor's degree (or the equivalent)
- h) be an undergraduate certificate or degree-seeking student enrolled full-time in a Massachusetts public state university;
- i) maintain a cumulative 3.0 GPA on all academic coursework in accordance with institutional standards; and
- j) meet any additional institutional eligibility or selection criteria, which may include financial need or merit considerations.

MATCHING REQUIREMENT

This program requires a committed one-for-one match of private funds for each dollar of state appropriated funds. Each state university will conduct general fundraising to secure matching funds. Any gift or donation made to the institution or its foundation for the express purpose of supporting internships or other gifts or donations made available through general fundraising by the institution and assigned as matching funds to the internship incentive program in the current fiscal year will qualify to meet this matching requirement.

No other state funds, including any other state-assisted internship stipends, may be counted as a match.

Documentation of all claimed matches must be maintained by each state university consistent with generally accepted accounting practices, including for wages and/or stipends.

ALLOTMENT OF STATE FUNDS

To promote broad-based student participation in internship placements across academic departments, statewide, and to provide a minimum baseline of funding for each campus, 50% of available state funds shall be allotted equally to each eligible institution and the remaining 50% shall be allotted on the basis of each institution's percentage of full-time enrolled undergraduate students across the State University system.

AWARD VALUE

To promote broad-based student participation in internship placements, students are only eligible for one stipend award from this program. The maximum student award under this program is \$5,000 per internship. Individual awards shall be determined by each institution to include a base award plus the option of an additional award up to the \$5,000 limit for extraordinary expenses.

AWARD PROCEDURE

Participating institutions are required to verify the enrollment status of all students identified to participate in the SU-II program. Based on enrolled status and upon verification of Grade Point Average (GPA), the institution shall disburse stipends to all eligible students through the standard procedures used for disbursing state financial aid funds. Such disbursement may occur at the beginning of the academic term in which the student commences the internship program.

If a student is participating in an internship program that requires a mandatory program fee, the institution may forward such funds to the agency on behalf of the student, once invoiced. Such payments may not exceed the maximum stipend available to a student under this program.

Payments must be provided directly to each student, unless a balance is owed to the institution for direct charges.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the State University Internship Incentive Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the State University Internship Incentive Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the State University Internship Incentive Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the State University Internship Incentive Program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XIX. Scholar Internship Match Fund

BOARD OF HIGHER EDUCATION SCHOLAR-INTERNSHIP MATCH FUND

PURPOSE

As part of the 2006 Economic Stimulus legislation (Chapter 123 of the Acts of 2006), the Massachusetts Legislature enacted the Massachusetts Scholar-Internship Match Fund (Chapter 29, Section 2UUU of the M.G.L.). The purpose of the Scholar-Internship Match Fund is to provide a match for industry scholarships and internships given to Massachusetts students going on to study for a post-secondary degree at Massachusetts public higher education institutions. Students shall pursue post-secondary degrees and career paths in specific science, technology, engineering and mathematics (STEM) disciplines that link directly related work experience with their academic program. These disciplines do and will directly support the economic development of the Commonwealth by fulfilling the employment needs of business and industry in high-demand fields. The Massachusetts Scholar-Internship Match Fund creates a framework whereby internship and scholarship funds from business, industry and other sources may be deposited as matching resources to enhance student progress toward degrees in fields vital to the Commonwealth.

DEFINITIONS

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education, as identified in Section 5 of Chapter 1 5A of the Massachusetts General Laws.

ELIGIBLE PROGRAM:

An undergraduate degree program offered by an eligible institution in high-demand STEM areas, as designated in the Science and Mathematics Access to Retain Talent (SMART) list, exclusive of foreign languages, as developed by the U.S. Department of Education and as amended by the Board of Higher Education.

ELIGIBILITY REQUIREMENTS

To be eligible for the Scholar-Internship Match Fund program, the student must:

- a) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law² or otherwise;

- c) be accepted for admission to, or be currently enrolled, full-time in an eligible program, at an eligible institution as defined above;
- d) submit an application for the Massachusetts Scholar-Internship Program, and for approval must:
 - a. if a high school senior, have a minimum cumulative GPA of 3.0;
 - b. if a current college student, meet satisfactory academic progress standards as defined by the institution, and have maintained a cumulative GPA of 3.0 on all college work and meet other eligibility criteria established by the Board of Higher Education;
 - c. complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
 - d. comply with financial aid verification requirements;
 - e. sign an agreement to comply with the internship requirements of the Scholar-Internship Program with a designated Massachusetts employer in a career-related field under the guidance of the Board of Higher Education;
 - f. complete the minimum number of internships as required; and
 - g. upon the completion of the undergraduate degree program, seek and attain employment in a career-related field in Massachusetts.

MAINTENANCE OF ELIGIBILITY

It is the responsibility of each recipient of the Scholar-Internship Match Fund Program to maintain their continued eligibility for scholarship assistance and/or internship experience while completing the undergraduate degree program. Recipients must demonstrate continued progress in the academic discipline through an annual submission of the college academic transcript, which will be evaluated by the appropriate official. The recipient is responsible for providing the transcript to the proper official at the Board of Higher Education, as designated, in a timely manner to facilitate continued awarding of the scholarship and/or assigned internship.

REPORTS

The Commissioner of Higher Education shall, no later than July 1, annually report to the House and Senate Committees on Ways and Means, the Joint Committee on Economic

Development and Emerging Technologies, the Joint Committee on Labor and Workforce Development, the Joint Committee on Education and the Joint Committee on Higher Education. The report shall include:

- a) a list of matching scholarship recipients,
- b) the associated match amount,
- c) the amounts of non-state funding as a result of the match,
- d) the purposes of the match,
- e) whether there was an internship associated with the industry match,
- f) an annual statement of cash inflows and outflows detailing the sources and uses of funds,
- g) a forecast of future payments based on current binding obligations, and
- h) a detailed account of the purposes and amount of administrative costs charged to the fund.

The Commissioner shall include in the annual report a detailed five-year legislative review of the Scholar- Internship Match Fund for consideration for recapitalization.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Scholar- Internship Match Fund. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Scholar- Internship Match Fund must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Scholar- Internship Match Fund.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Scholar- Internship Match Fund. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XX. MASSGrant PLUS

BOARD OF HIGHER EDUCATION MASSGRANT PLUS

PURPOSE

The Massachusetts Assistance for Student Success Grant Plus (MASSGrant Plus) is the Commonwealth's Tuition-free assistance program for students enrolled at a public four-year institution and who meet the Pell Grant Student Aid Index (SAI) eligibility criteria.¹ MASSGrant Plus is subject to the availability of funding and appropriation by the Massachusetts legislature (M.G.L. c. 15A, section 16). These guidelines pertain to the state's MASSGrant Plus program.²

MASSGrant Plus is a last dollar state financial aid program that provides full and part-time undergraduate students, enrolled at a public four-year college or university in the state, with the resources needed to fully cover the cost of tuition and fees towards a bachelor's degree. Additionally, the MASSGrant Plus program provides eligible students, enrolled at any public two or four-year institution of higher education in the state, with an ***Allowance and Support Award*** (also referred to as a stipend) to cover other educational expenses that may impede opportunities to enroll in college or complete a program of study.

DEFINITIONS

ELIGIBLE INSTITUTION:

A Massachusetts two or four-year college or university 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 approved undergraduate degree or certificate program offered by an eligible institution, as defined.

ELIGIBILITY REQUIREMENTS

To be eligible for the MASSGrant Plus program, a student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;

¹ Students, such as undocumented students, who are unable to complete a FAFSA due to their immigration status shall, consistent with the Tuition Equity Law, complete the state alternative financial aid application (MASFA) and must have an SAI that falls within the eligibility range for Pell, as calculated based on the state alternative form.

² Students interested in learning more about the state's "Free Community College" Programs can do so by clicking on the following links: www.mass.edu/masseducate and www.mass.edu/massreconnect

- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law³ or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or, if ineligible to complete the FAFSA, then complete the Massachusetts Application for State Financial Aid (MASFA) by June 30, 2025;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans, or owe a refund for any previous state financial aid program;
- g) not have earned a prior associate or bachelor's degree if enrolled at a community college, or a prior bachelor's degree if enrolled at a four-year college or university;
- h) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an eligible undergraduate program of study leading to a certificate, associate, or bachelor's degree; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

MASSGRANT PLUS CONDITIONS

- Disbursement of funds: MASSGrant Plus funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education.
- MASSGrant Plus funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the fiscal year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request; and no less than on a quarterly basis.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the MASSGrant Plus program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned a prior associate or baccalaureate degree

³ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Acts of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity/>

(or equivalent), which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.

- MASSGrant Plus may be awarded to support summer enrollment, if funds are available.
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the MASSGrant Plus program.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded MASSGrant Plus funds as follows⁴:

Bachelor's Degree

Full-Time	Maximum of 5 years, 10 semesters for full-time (minimum of 12 enrolled credits per academic term)
Part-Time	Maximum of 7 years, 14 semesters for part-time (minimum of 6 enrolled credits per academic term)

Associate Degree

Full-Time	Maximum of 3 years, 6 semesters for full-time (minimum of 12 enrolled credits per academic term).
Part-Time	Maximum of 5 years, 10 semesters for part-time (6 enrolled credits minimum per academic term).

Certificate Program

Full-Time	Maximum of 4 semesters
Part-Time	Maximum of 8 semesters

AWARD VALUE

Subject to appropriation and the availability of funds, the **MASSGrant Plus Award** is a last dollar resource made available to students enrolled at any one of the Commonwealth public four-year colleges and universities. Awards should not exceed the calculated costs of tuition and fees as determined by the institution and published in its annual Cost of Attendance (COA) and approved by the BHE pursuant to M.G.L. c.15A, Section 5B(c)(1), for the academic term, during which the grant is made.

⁴ Please note that an additional year of assistance may be awarded based on extenuating circumstances, with prior approval of a written appeal by institution.

An additional **Allowance and Support Award** (also referred to as a stipend) of up to \$1,000 for books and supplies, and other approved costs, may be provided to students enrolled at any one of the Commonwealth's public four-year or two-year colleges and universities who meet the eligibility requirements and award criteria.

Any MASSGrant Plus award (either grant or stipend) expended beyond costs related to tuition and fees, and the allowance for books, supplies, and other costs as defined, must be approved or authorized by the Commissioner of Higher Education, or their designee.

AWARD CALCULATION

Students enrolled at a public four-year college or university and pursuing an undergraduate program of study leading to a bachelor's degree may receive a **MASSGrant Plus Award** to cover *Financial Unmet Need* for costs associated with **tuition and fees** the corresponding academic term or year. The award calculation for an eligible student is as follows:

$$\text{MASSGrant Plus Award} = \text{Tuition and Fees (minus) All Other Non-Loan Aid}$$

An additional **MASSGrant Plus Allowance and Support Award**⁵ (also referred to as a stipend) for books and supplies, and other approved costs, may be available to students enrolled at any one of the Commonwealth's public two-year or four-year colleges or universities and who meet the eligibility requirements. The maximum Allowance and Support Award in any academic year shall be \$1,000, and shall not exceed \$600 in any single semester. This award calculation, **based on the number of enrolled credits each semester**, is as follows:

$$\text{MASSGrant Plus Allowance and Support Award} = \text{Cost of Attendance COA (minus) All Other Non-Loan Aid}$$

12 or more credits	up to \$1,000 per academic year; not to exceed \$600 per semester
9-11 credits	up to \$800 per academic year, not to exceed \$450 per semester
6-8 credits	up to \$500 per academic year, not to exceed \$300 per semester

Student eligibility for the **Allowance and Support Award** should be assessed and determined at the beginning of each semester and the student's semester award amount should align with the student's credit hours per semester.

⁵ Students participating in the state's MassEducate programs may also be eligible to receive an additional Allowance and Support Award of up to \$1,000, if they meet the MASSGrant Plus eligibility and award calculation requirements. This award is subject to the appropriation and availability of funding.

For financial aid award packages that were finalized before the effective date of these guidelines using the **Allowance and Support Award** funding amounts approved for Academic Year 2024-2025, please note the following: in no event shall any such student's Fall 2025 **Allowance and Support Award** amount be reduced to recoup the difference between the amount awarded and the amount allowable pursuant to these guidelines. To address this issue and ensure that student Fall awards are not reduced, the DHE has maintained the prior maximum allowable amounts for a semester award, subject to the updated maximum annual award for Academic Year 2025-2026.

Example #1: Student A enrolls in the fall semester for the first time during Academic Year 2025-2026. Student A enrolls in 12 credits and prior to the effective date of these guidelines the student was awarded the maximum annual Allowance and Support Award based on last year's guidelines (e.g., \$1200) with a fall disbursement in the amount of \$600; to stay within the \$1000 maximum award Student A's spring disbursement would be \$400 (provided the student maintains their prior semester credit load (e.g., 12 credits) for the spring semester.

Example #2: Student B enrolls in the spring semester for the first time during Academic Year 2025-2026. Student B enrolls in 12 credits, and receives an Allowance and Support Award spring disbursement in the amount of \$600; to stay within the \$1000 maximum award Student B's summer disbursement would be \$400 (provided the student enrolls in and maintains their prior semester credit load (e.g., 12 credits) for the summer semester.

Example #3: Student C enrolls in the fall semester for the first time during Academic Year 2025-2026. Student C enrolls in 9 credits, and receives an Allowance and Support Award fall disbursement in the amount of \$450; to stay within the \$800 maximum award Student B's spring disbursement would be up to \$350 (provided the student maintains their prior semester credit load (e.g., 9 credits) for the spring semester.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the MASSGrant Plus program, and that the student is enrolled in an approved certificate, associate, or bachelor's degree program. Further, the institution is required to verify that the student has not earned a prior degree (or equivalent) before awarding and disbursing funds, which may be done through a signed affidavit after all reasonable attempts were made to secure prior transcripts, if any.

Institutions are required to refund to the DHE any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Refunds may occur because of adjustments to SAI, changes to dependency status, and/or changes to a student's enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged. MASSGrant

Plus may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the MASSGrant Plus program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the DHE or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the MASSGrant Plus Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the MASSGrant Plus program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the MASSGrant Plus program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XXI. MASSGrant PLUS Expansion

BOARD OF HIGHER EDUCATION MASSGRANT PLUS EXPANSION

PURPOSE

An extension of MASSGrant Plus, the MASSGrant Plus Expansion program provides financial assistance to non-Pell eligible students and families with a Student Aid Index (SAI) that does not exceed \$15,000. This expansion program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature (M.G.L. c. 15A, Section 16). Students who meet the eligibility requirements and enroll in an approved program of study at a Massachusetts public four-year college or university may receive up to half the cost of tuition and fees towards a bachelor's degree. These guidelines pertain to the MASSGrant Plus Expansion program.

DEFINITIONS

ELIGIBLE INSTITUTION:

A Massachusetts four-year college or university 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 approved undergraduate bachelor's degree program offered by an eligible institution, as defined.

ELIGIBILITY REQUIREMENTS

To be eligible for the MASSGrant Plus Expansion program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law³ or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or, if ineligible to complete the FAFSA, then complete the Massachusetts Application for State Financial Aid (MASFA) by June 30, 2025;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans or owe a refund for any previous state financial aid program;

- g) not have earned a prior associate or bachelor's degree if enrolled at a community college, or a prior bachelor's degree if enrolled at a four-year college or university;
- h) enroll, as a matriculated student, on a full-time basis (minimum of 12 credits, or the equivalent) in an eligible undergraduate program of study leading to a bachelor's degree; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

MASSGRANT PLUS EXPANSION CONDITIONS

- Disbursement of funds: MASSGrant Plus Expansion funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education.
- MASSGrant Plus Expansion funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the fiscal year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request; and no less than on a quarterly basis.
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the MASSGrant Plus Expansion program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned a prior associate or baccalaureate degree (or equivalent), which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.
- MASSGrant Plus Expansion funding may be used to prioritize awards to Pell eligible students who qualify under the MASSGrant Plus program.
- MASSGrant Plus Expansion may be awarded to support summer enrollment, if funds are available.
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the MASSGrant Plus Expansion program.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY

Eligible students may be awarded MASSGrant Plus Expansion funds as follows¹:

Bachelor's Degree

Full-Time	Maximum of 5 years, 10 semesters for full-time (minimum of 12 enrolled credits per academic term).
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AWARD VALUE

Subject to appropriation and the availability of funds, the MASSGrant Plus Expansion is a last dollar resource made available to students enrolled at any one of the Commonwealth public four-year colleges and universities. Awards should not exceed 50 percent of the calculated costs of tuition and fees as determined by the institution and published in its annual Cost of Attendance (COA) for the academic term, during which the grant is made.

AWARD CALCULATION

A students enrolled at a public four-year college or university, pursuing an undergraduate program of study leading to a bachelor's degree, and whose Student Aid Index (SAI) does not exceed \$15,000 may receive a **MASSGrant Plus Expansion Award** for up to half of the costs associate with tuition and fees charged for the academic term or year. The award calculation for an eligible student is as follows:

***MASSGrant Plus Expansion Award = [Tuition and Fees (**minus**) All Other Non-Loan Aid]
(multiplied by) 0.50 (50 percent)***

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the MASSGrant Plus Expansion program, and that the student is enrolled in an approved bachelor's degree program. Further, the institution is required to verify that the student has not earned a prior bachelor's degree (or equivalent) before awarding and disbursing funds, which may be done through a signed affidavit after all reasonable attempts were made to secure prior transcripts, if any.

Institutions are required to refund to the DHE any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Refunds may occur because of adjustments to SAI, changes to dependency status, and/or changes to a student's enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged. MASSGrant

¹ Please note that an additional year of assistance may be awarded based on extenuating circumstances, with prior approval of a written appeal by institution.

Plus Expansion funds may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the MASSGrant Plus Expansion program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the MASSGrant Plus Expansion program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the MASSGrant Plus Expansion program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the MASSGrant Plus Expansion program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XXII. High Demand Scholarship

**BOARD OF HIGHER EDUCATION
MASSACHUSETTS HIGH DEMAND SCHOLARSHIP PROGRAM**

PURPOSE

The Massachusetts High Demand Scholarship Program was created by the Massachusetts Legislature to support economic development in the Commonwealth by providing financial assistance to residents who are pursuing programs of study that will help address the Commonwealth's workforce needs. The program will provide scholarships to students to encourage enrollment and completion of training and degree programs identified by the Massachusetts Executive Office of Labor and Workforce Development's annual reports on labor market conditions.

DEFINITIONS

ELIGIBLE INSTITUTION:

Any approved public or independent college, university, school of nursing or any other institution furnishing a program of higher education in high demand fields in the Commonwealth.

ELIGIBLE PROGRAM:

Any undergraduate degree or certificate program offered by an eligible institution and identified by the Executive Office of Labor and Workforce Development as a high-demand occupation.

ELIGIBILITY REQUIREMENTS

To be eligible for the Massachusetts High Demand Scholarship Program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

- d) declare a major or be currently pursuing a program of study offered and verifiable by the institution that is also designated as a high-demand profession by the Massachusetts Executive Office of Labor and Workforce Development;
- e) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- f) comply with financial aid verification requirements;
- g) complete the High Demand Scholarship application and sign the program terms and conditions;
- h) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an eligible undergraduate program of study;
- i) have not earned a bachelor's degree (or the equivalent);
- j) achieve and maintain a minimum college-level GPA of 3.0 annually and meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards;
- k) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program; and
- l) not be a recipient of funds under any of the following financial aid workforce programs: Tomorrow's Teachers Scholarship, Behavioral Health Workforce Scholarship, Early Childhood Educators Scholarship, or the Paraprofessional Grant. Students who simultaneously apply and meet eligibility criteria for more than one of these workforce programs shall only be determined eligible for one program.

In rare and extenuating circumstances, the Commissioner or the Commissioner's designee may permit an exception to the above criteria and award the Massachusetts High Demand Scholarship. In such cases, supporting documentation must be provided by the student and maintained by the Office of Student Financial Assistance.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded Massachusetts High Demand Scholarship Program funds as follows:

Associate Degree

Full-time	Maximum of 2 years, 4 semesters for full-time (minimum of 12 enrolled credits per academic term).
Part-Time	Maximum of 4 years, 8 semesters for part-time (minimum of 6 enrolled credits per academic term).

Bachelor Degree

Full-time	Maximum of 4 years, 8 semesters for full-time (minimum of 12 enrolled credits per academic term).
Part-Time	Maximum of 6 years, 12 semesters for part-time (minimum of 6 enrolled credits per academic term).

Students may receive an additional payment up to \$1,000 for summer study at a four-year institution, or \$500 at a community college, if funds are available after all academic year awards are disbursed. Summer awards are limited to a maximum of three terms (one per academic year) for any student attending a four-year or two-year college or university.

AWARD VALUE

The following are maximum award values; final award values will be based on the Award Procedure, below. Awards for eligible applicants under this program may be used to support tuition, fees and related educational costs, and shall be based on the type of institution and the student's enrollment status as follows:

Community College Students

\$7,000 per year or \$3,500 per semester - Full-time enrollment (12 credits or more)
 \$3,500 per year or \$1,750 per semester - Part-time enrollment (6-11 credits)

State University Students

\$11,500 per year or \$5,750 per semester - Full-time enrollment (12 credits or more)
 \$5,750 per year or \$2,875 per semester - Part-time enrollment (6-11 credits)

University of Massachusetts Students

\$17,500 per year or \$8,750 per semester - Full-time enrollment (12 credits or more)
 \$8,750 per year or \$4,375 per semester - Part-time enrollment (6-11 credits)

Independent College or University Students

\$17,500 per year or \$8,750 per semester - Full-time enrollment (12 credits or more)
\$8,750 per year or \$4,375 per semester - Part-time enrollment (6-11 credits)

The academic year and/or semester awards for this program may be reduced by the Department of Higher Education in accordance with the award procedure, below, and/or if the annual appropriation is not sufficient to meet the maximum scholarship award for the eligible pool of applicants.

The Department of Higher Education will annually review the tuition and fee charges at Massachusetts public colleges and universities and adjust the program award values, as it deems necessary.

AWARD PROCEDURE

Scholarships under this program shall be awarded only to applicants who meet all program eligibility criteria, and may be prioritized based on one or more of the following:

- a) Awarded only to students who complete the High Demand Scholarship application and FAFSA, or alternative application by the published priority deadline
- b) Awarded in proportion to the regional labor and workforce demand for each discipline/profession, based on data provided by the Executive Office of Labor and Workforce Development, as determined by the Department of Higher Education
- c) Awarded preferentially to first generation college students and traditionally underserved student populations
- d) Awarded based on demonstrated student potential for excellence in the discipline/profession including high academic achievement
- e) Awarded on the basis of demonstrated financial need, based on reported Student Aid Index (SAI), to promote access to scholarship funds by diverse populations within academic levels (year of study such as freshman, sophomore, junior, senior), as determined by the Department of Higher Education

Institutions are required to adjust a student's financial aid package, if the sum total of all financial aid, including the High Demand Scholarship, results in an "over award", as defined under Title IV regulations governing federal aid, and related state financial aid policies. The Board of Higher Education will annually review this scholarship program, and based upon its findings, may revise award procedures accordingly.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the High Demand Scholarship Program, and that the student is enrolled in an approved undergraduate program, as applicable.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the High Demand Scholarship Program. In addition to completing the verification of enrollment status (credits and GPA) for students each semester, institutions are also responsible for providing the Department of Higher Education and the Office of Student Financial Assistance with related data for scholarship recipients, as requested and required under the annual Institutional Participation Agreement for Massachusetts State Financial Aid.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Massachusetts High Demand Scholarship Program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Massachusetts High Demand Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Massachusetts High Demand Scholarship Program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Massachusetts High Demand Scholarship Program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XXIII. MassEducate

BOARD OF HIGHER EDUCATION FREE COMMUNITY COLLEGE PROGRAM—MASSEDUCE

PURPOSE

MassEducate and MassReconnect, collectively, are the Commonwealth’s “free community college” grant programs. Both MassEducate and MassReconnect are subject to the availability of funding and appropriation by the Massachusetts legislature (M.G.L. c. 15A, section 5B). These guidelines pertain to the state’s MassEducate program.¹

MassEducate provides financial assistance to full and part-time undergraduate students, who meet the eligibility requirements and are enrolled in and pursuing an approved program of study at one of the Commonwealth’s 15 public community colleges. The program is designed to provide last dollar financial assistance to ensure that all community college students have adequate resources to fully cover tuition and fees towards a certificate, associate degree, or other legislatively mandated courses or program² at a community college. MassEducate students also receive an additional *Allowance and Support Award* for books and supplies (also referred to as a stipend), and other approved costs to mitigate barriers that may impede opportunities for students to enroll in college and complete a program of study.

DEFINITIONS

ELIGIBLE INSTITUTION:

A Massachusetts community college within the public system of higher education as identified in Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

An approved certificate or associate degree program offered at a Massachusetts public community college.

EMT PROGRAM:

Courses that meet the initial training requirements for emergency medical technical and paramedic certification, pursuant to Item 1596-2501 of Chapter 9 of the Acts of 2025.

ELIGIBILITY REQUIREMENTS

To be eligible for the MassEducate program, a student must:

- a) be enrolled in an eligible institution, as defined;

¹ Community college students who are 25 years of age or older can learn more about the state’s MassReconnect program by clicking on the following link: <https://www.mass.edu/massreconnect>

² Item 1596-2501 of Chapter 9 of the Acts of 2025 permits students enrolled in courses that meet the initial training requirements for emergency medical technician and paramedic certification to participate in the state’s MassEducate program.

- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law³ or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or, if ineligible to complete the FAFSA, then complete the Massachusetts Application for State Financial Aid (MASFA);
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have not earned a bachelor's degree (or the equivalent);
- h) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in eligible undergraduate courses or programs of study leading to a certificate or associate degree; and
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.
- j) **Provided, however**, a student enrolled in an EMT program or courses that meet the initial training requirements for emergency medical technical and paramedic certification courses is exempt from eligibility requirements outlined in lines g) and h) above.⁴

MASEDUCATE CONDITIONS

- Disbursement of funds: MassEducate funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education.
- MassEducate funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the academic year.
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request, and no less than on a quarterly basis.

³ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Acts of 2024. Click on the following link for information on the Massachusetts Tuition Equity Law: <https://www.mass.edu/tuitionequity>

⁴ Pursuant to Item 1596-2501 of Chapter 9 of the Acts of 2025.

- Institutions shall facilitate access to on-campus support services to students who receive assistance under the MassEducate program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include an accurate determination of whether the student has earned more than one prior associate or a baccalaureate degree (or equivalent), which may include a signed affidavit from the student after all reasonable attempts were made by the student to access prior transcripts.
- MassEducate may be awarded to support summer enrollment, if funds are available.
- Institutions are required, upon request, to submit data to the DHE to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the MassEducate Program.
- The BHE shall annually establish the tuition rates and monitor the fees set by community college Boards of Trustees for compliance with statutory requirements mandated for Massachusetts community colleges participating in MassEducate, M.G.L. c. 15A, Section 5B(c)(1) and (d) and Section 9(i).

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY AND DEGREE TYPE

Eligible students may be awarded MassEducate funds as follows⁵:

Associate Degree

Full-Time	Maximum of 3 years, 6 semesters for full-time (minimum of 12 enrolled credits per academic term).
Part-Time	Maximum of 5 years, 10 semesters for part-time (6 enrolled credits minimum academic term).

Certificate Program

Full-Time	Maximum of 4 semesters
Part-Time	Maximum of 8 semesters

EMT Program

Full- and Part-Time	Maximum of 2 semesters
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⁵ An additional year of assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

AWARD VALUE

Subject to appropriation and the availability of funds, the **MassEducate Grant** is a last dollar resource awarded to eligible students under this program and shall not exceed the calculated costs of tuition and fees as determined by the institution and published in its annual Cost of Attendance (COA), and approved by the BHE pursuant to M.G.L. c.15A, Section 5B(c)(1), for the academic term during which the award is made.

An additional **Allowance and Support Award** (also referred to as a stipend) of up to \$1,000 for books and supplies, and other approved costs, shall be awarded to students whose household income is at or below 125 percent of the state median income, or other income level established by the department.⁶

MassEducate awards (either grants or stipends) expended beyond costs related to tuition and fees, and the allowance for books, supplies, and other costs as defined, must be approved or authorized by the Commissioner of Higher Education, or their designee.

Higher cost certificate or degree programs, which exceed 150% of the institution's average tuition and fee costs, may require annual approval by the Massachusetts Department of Higher Education (DHE).

AWARD CALCULATION

All students who meet the eligibility requirements and are enrolled in an undergraduate program of study leading to a certificate, associate degree, or other legislatively mandated courses or program⁷ may receive a MassEducate Grant award to cover Financial Unmet Need for costs associated with tuition and fees, as defined and approved by the BHE, for the corresponding academic term or year. The award calculation for an eligible student is as follows:

$$\text{MassEducate Grant} = \text{Tuition and Fees (minus) All Other Non-Loan Aid}$$

An additional MassEducate **Allowance and Support Award**⁸ (also referred to as a stipend) for books and supplies, and other approved costs is available to Pell-eligible students or those with a Student Aid Index (SAI) at or below \$20,000. The maximum Allowance and Support Award in any academic year shall be \$1,000, and shall not exceed \$600 in any single semester. This award calculation, based on the number of enrolled credits each semester, is as follows:

⁶ A student is considered eligible for an Allowance and Support Award (stipend) if they qualify for a Pell Grant or have a Student Aid Index (SAI) at or below \$20,000.

⁷ Pursuant to Item 1596-2501 of Chapter 9 of the Acts of 2025, students enrolled in courses that meet the initial training requirements for emergency medical technician and paramedic certification to qualify for the state's MassEducate program.

⁸ Students receiving an Allowance and Support Award through the MassEducate program may also be eligible to receive an additional stipend of up to \$1,000 through the MASSGrant Plus program, subject to the availability of funds and the eligibility guidelines of the program.

Allowance and Support Award = Cost of Attendance COA (minus) All Other Non-Loan Aid

12 or more credits	up to \$1,000 per academic year; not to exceed \$600 per semester
9-11 credits	up to \$800 per academic year, not to exceed \$450 per semester
6-8 credits	up to \$500 per academic year, not to exceed \$300 per semester
5 credits or less	up to \$400 per academic year, not to exceed \$200 per semester

Student eligibility for the **Allowance and Support Award** should be assessed and determined at the beginning of each semester and the student's semester award amount should align with the student's credit hours per semester.

For financial aid award packages that were finalized before the effective date of these guidelines using the **Allowance and Support Award** funding amounts approved for Academic Year 2024-2025, please note the following: in no event shall any such student's Fall 2025 **Allowance and Support Award** amount be reduced to recoup the difference between the amount awarded and the amount allowable pursuant to these guidelines. To address this issue and ensure that student Fall awards are not reduced, the DHE has maintained the prior maximum allowable amounts for a semester award, subject to the updated maximum annual award for Academic Year 2025-2026.

Example #1: Student A enrolls in the fall semester for the first time during Academic Year 2025-2026. Student A enrolls in 12 credits and prior to the effective date of these guidelines the student was awarded the maximum annual Allowance and Support Award based on last year's guidelines (e.g., \$1200) with a fall disbursement in the amount of \$600; to stay within the \$1000 maximum award Student A's spring disbursement would be \$400 (provided the student maintains their prior semester credit load (e.g., 12 credits) for the spring semester.

Example #2: Student B enrolls in the spring semester for the first time during Academic Year 2025-2026. Student B enrolls in 12 credits, and receives an Allowance and Support Award spring disbursement in the amount of \$600; to stay within the \$1000 maximum award Student B's summer disbursement would be \$400 (provided the student enrolls in and maintains their prior semester credit load (e.g., 12 credits) for the summer semester.

Example #3: Student C enrolls in the fall semester for the first time during Academic Year 2025-2026. Student C enrolls in 9 credits, and receives an Allowance and

Support Award fall disbursement in the amount of \$450; to stay within the \$800 maximum award Student B's spring disbursement would be up to \$350 (provided the student maintains their prior semester credit load (e.g., 9 credits) for the spring semester.

Please note that a student receiving an **Allowance and Support Award** through the MassEducate program may receive an additional, second stipend of up to \$1,000 through the **MASSGrant Plus**⁹ program, subject to the availability of funds and the program eligibility guidelines of the program. Additionally, a student who has previously earned an associate degree may receive financial assistance to complete up to one additional associate degree under the MassEducate program.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the MassEducate program, and that the student is enrolled in a state approved program or other permitted specialty courses. Further, the institution is required to verify that the student has not earned a prior bachelor's degree (or equivalent), and/or if the student has earned more than one associate's degree (if applicable), before awarding and disbursing funds, which may be done through a signed affidavit after all reasonable attempts were made to secure prior transcripts, if any.

Institutions are required to refund to the DHE any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Refunds may occur because of adjustments to SAI, changes to dependency status, and/or changes to a student's enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged. MassEducate may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the efficacy of the MassEducate program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

⁹ Learn more about the state's MASSGrant Plus program by clicking on the following link by clicking [here](#).

PARTICIPATION AGREEMENT

All institutions receiving funds under the MassEducate Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the MassEducate program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the MassEducate program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XXIV. Behavioral Health Workforce Scholarship

**BOARD OF HIGHER EDUCATION
BEHAVIORAL HEALTH WORKFORCE SCHOLARSHIP PROGRAM**

PURPOSE

The Behavioral Health Workforce Scholarship Program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature. The behavioral health workforce is identified as a priority workforce area. Supporting individuals in the behavioral health pipeline throughout their education and career development is essential to increasing the pool of available behavioral health professionals working to serve the needs of the Commonwealth. The Behavioral Health Workforce Scholarship program will provide funds to Massachusetts public and private institutions of higher education (IHEs) to provide financial incentives for behavioral health students to complete graduate-level degree and graduate-level certificate programs and apply newly advanced skills to high need behavioral health settings in Massachusetts.

DEFINITIONS

ELIGIBLE INSTITUTION:

Accredited public and private higher education institutions located in the Commonwealth and authorized to grant degrees that offer eligible graduate-level programs, listed below:

AMERICAN INTERNATIONAL COLLEGE
ANNA MARIA COLLEGE
ASSUMPTION UNIVERSITY
BAY PATH UNIVERSITY
BERKLEE COLLEGE OF MUSIC
BOSTON COLLEGE
BOSTON GRADUATE SCHOOL OF PSYCHOANALYSIS INC
BOSTON UNIVERSITY
BRIDGEWATER STATE UNIVERSITY
CAMBRIDGE COLLEGE
COLLEGE OF OUR LADY OF THE ELMS
EMMANUEL COLLEGE
FITCHBURG STATE UNIVERSITY
FRAMINGHAM STATE UNIVERSITY
GORDON COLLEGE
GORDON-CONWELL THEOLOGICAL SEMINARY
HARVARD UNIVERSITY
LESLEY UNIVERSITY
MASSACHUSETTS COLLEGE OF LIBERAL ARTS

MCPHS UNIVERSITY
MERRIMACK COLLEGE
MGH INSTITUTE OF HEALTH PROFESSIONS
NORTHEASTERN UNIVERSITY
REGIS COLLEGE
SALEM STATE UNIVERSITY
SIMMONS UNIVERSITY
SMITH COLLEGE
SPRINGFIELD COLLEGE
SUFFOLK UNIVERSITY
TUFTS UNIVERSITY
UNIVERSITY OF MASSACHUSETTS-AMHERST
UNIVERSITY OF MASSACHUSETTS-BOSTON
UNIVERSITY OF MASSACHUSETTS-DARTMOUTH
WESTERN NEW ENGLAND UNIVERSITY
WESTFIELD STATE UNIVERSITY
WILLIAM JAMES COLLEGE
WORCESTER STATE UNIVERSITY

Or any other accredited public or private higher education institutions located and authorized to grant degrees in the Commonwealth that (1) offer eligible graduate-level programs, and (2) are attended by an eligible student that currently lives in one of the Advancing Health Equity in Massachusetts Priority Geographies municipalities.

ELIGIBLE PROGRAM:

Approved behavioral health graduate degree or graduate-level certificate programs, inclusive of mental health and substance use disorder (SUD)/opioid use disorder (OUD) treatment programs, listed below:

- Master's level Social Work
- Mental Health Counseling
- Substance Abuse Counseling
- Marriage and Family Therapy/Counseling
- Rehabilitation Counseling
- Master's level Psychology programs
- Psychoanalysis
- Master's level Psychiatric/Mental Health Nursing programs
- Master's level Pastoral Counseling programs

Or any other graduate-level programs that directly name behavioral health, mental health, or substance use treatment as its specific area of inquiry within the following CIP Codes:

Program	CIP Code
College Student Counseling and Personnel Services	13.1102
Student Counseling and Personnel Services, Other	13.1199
Pastoral Studies/Counseling	39.0701
Clinical Psychology	42.2801
Counseling Psychology	42.2803
School Psychology	42.2805
Educational Psychology	42.2806
Health/Medical Psychology	42.2810
Forensic Psychology	42.2812
Applied Behavior Analysis	42.2814
Clinical, Counseling and Applied Psychology, Other	42.2899
Social Work	44.0701
Youth Services/Administration	44.0702
Substance Abuse/Addiction Counseling	51.1501
Community Health Services/Liaison/Counseling	51.1504
Marriage and Family Therapy/Counseling	51.1505
Psychoanalysis and Psychotherapy	51.1507
Mental Health Counseling/Counselor	51.1508
Mental and Social Health Services and Allied Professions, Other	51.1599
Community Health and Preventive Medicine.	51.2208
Maternal and Child Health	51.2209
Behavioral Aspects of Health	51.2212
Art Therapy/Therapist	51.2301
Music Therapy/Therapist	51.2305
Occupational Therapy/Therapist	51.2306
Therapeutic Recreation/Recreational Therapy	51.2309
Vocational Rehabilitation Counseling/Counselor	51.2310
Rehabilitation and Therapeutic Professions, Other	51.2399
Psychiatric/Mental Health Nurse/Nursing	51.3810
Geriatric Nurse/Nursing	51.3821

ELIGIBILITY REQUIREMENTS

To be eligible for the Behavioral Health Workforce Scholarship program, the student must:

- a) be enrolled in an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;

- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law² annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) sign a Terms and Conditions Agreement to continue employment and commit to providing behavioral health services in Massachusetts upon completing the eligible certificate or graduate degree requirement, which shall be six months of service for each semester of award under this program, following completion of the program;
- h) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an eligible graduate program of study leading to a certificate or graduate level degree;
- i) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards; and
- j) not be a recipient of funds under any of the following financial aid workforce programs: Tomorrow's Teachers Scholarship, High Demand Scholarship, Early Childhood Educators Scholarship, or the Paraprofessional Grant. Students who simultaneously apply and meet eligibility criteria for more than one of these workforce programs shall only be determined eligible for one program.

PROGRAM CONDITIONS

- Disbursement of funds: Behavioral Health Workforce Scholarship funding is disbursed to institutions on a semester basis for students who meet all eligibility criteria, as certified by the institution;

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

² For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

- Payment of Behavioral Health Workforce Scholarship funds is sent directly to the institution from the Commonwealth's Comptroller's Office. Funds must be disbursed to students by the end of the academic year;
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request, and no less than on a quarterly basis;
- Institutions shall facilitate access to on-campus support services to students who receive assistance under the Behavioral Health Workforce Scholarship program, to promote persistence in and completion of their program of study;
- The institution is responsible for verifying student eligibility;
- Behavioral Health Workforce Scholarships may be awarded to support summer enrollment that occurs prior to the end of the corresponding academic year, if funds are available; and
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the Behavioral Health Workforce Scholarship Program.

RECIPIENT RESPONSIBILITIES

To remain eligible for the Behavioral Health Workforce Scholarship program, the student must:

- a) complete the scholarship application and sign a promissory note, annually, for continuation of scholarship funds;
- b) provide an official transcript at the conclusion of each academic year to confirm continued eligibility requirements for the program of study and satisfactory academic progress towards degree completion;
- c) sign a scholarship agreement to obtain certification and/or licensure and commit to working in Massachusetts for at least six months per academic semester of award under this program pursuant to the service commitment section below, and provided that failure to complete the required behavioral health work commitment will result in a repayment of funds as defined in said agreement;
- d) for individuals already employed in an eligible behavioral health setting, remain employed at that setting or another eligible behavioral health setting, and for individuals not yet employed in an eligible behavioral health setting, become employed in an eligible behavioral health setting within 6 months of completing an approved behavioral health graduate degree or graduate-level certificate;

- e) annually provide proof of employment to document fulfillment of the service obligation;
- f) acknowledge that this scholarship is considered repayment through service and in absence of fulfilling that commitment, the scholarship reverts to a loan that must be repaid by the scholarship recipient, per the terms of the promissory note; and
- g) acknowledge the set-forth repayment through service schedule, that 6 months of work will forgive one semester of scholarship.

AWARD VALUE

Pursuant to an interagency service agreement between the Executive Office of Health and Human Services and the Department of Higher Education, the Board of Higher Education is authorized to award up to \$12,500 for tuition, fees, and stipends for each academic year in which a student enrolls in and makes satisfactory academic progress in an eligible program, up to a maximum of \$25,000 per recipient across two academic years.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Behavioral Health Workforce Scholarship program, and that the student is enrolled in an approved behavioral health program. Disbursement of awards will not be made until the student's signed promissory note has been received and approved by the Department of Higher Education.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Behavioral Health Workforce Scholarships may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

FORFEITURE OF SCHOLARSHIP AWARD

Recipients of Behavioral Health Workforce Scholarships who fail to complete the behavioral health work commitment are required to repay all scholarship funds, as outlined in the promissory note.

AWARD PRIORITY

In the event the fiscal year appropriation is not sufficient to permit a full award to each eligible applicant, awards shall be prioritized for to students meeting all of the award priority criteria noted as follows:

- Students who are culturally/linguistically diverse

- Students who live in OR are completing programs in schools within Advancing Health Equity in Massachusetts Priority Geographies municipalities
- Students who are incumbent healthcare workers seeking career advancement in behavioral health who are working at least 20 hours/week
- Students who are working in any area of healthcare (including behavioral health) at least 20 hours/week

Subject to available funding, students that meet some of the criteria may also be eligible for a full award after students meeting all award priority criteria have been awarded. No partial awards will be made for any student.

SERVICE COMMITMENT

All recipients shall commit to working in Massachusetts, for six months per each semester of scholarship received. The maximum service commitment is 24 months for recipients that receive four semesters of scholarship. Recipients shall work in one of the following settings:

- inpatient, outpatient, acute care, substance use treatment, community-based and clinic-based settings, or
- for state-run or state-contracted settings including, but not limited to, settings run or contracted by the Department of Mental Health, the Department of Public Health, the Department of Developmental Services, and the Department of Children and Families, or the Department of Elementary and Secondary Education, or
- any additional such settings the Executive Office of Health and Human Services designates as eligible to meet the service requirement of this scholarship program.

For individuals that are already employed in an eligible behavioral health setting upon completion of an eligible program, service in such setting shall begin to count towards this service obligation as of the completion of the program. For all individuals, the program completion date for this purpose shall be the last date of the last academic semester in which the individual completed all program requirements or the date of conferral on the graduate degree or graduate-level certificate, whichever is earlier.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Behavioral Health Workforce Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Behavioral Health Workforce Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Behavioral Health Workforce Scholarship program.
- b) The Commissioner shall require each institution to furnish annually to the BHE a report detailing specific information regarding recipients of the Behavioral Health Workforce Scholarship program. OSFA will establish the timeline, specifications, and procedures for this report, which shall include the list of eligible institutions receiving allocations, the amount of funds allocated to each institution, the number and type of behavioral health degree programs supported at each institution by CIP code and credential level, the number of students supported by each program at each institution, aggregate demographic information about students participating in the program, enrollment status and graduation rates of students supported by each program, and student-level information including but not limited to employment status, role, and location.
- 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 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.

Massachusetts Assistance for Student Success Program

XXV. Behavioral Health Workforce Stipend

**BOARD OF HIGHER EDUCATION
SUPPORT FOR BEHAVIORAL HEALTH FIELD PLACEMENTS PROGRAM**

PURPOSE

The Support for Behavioral Health Field Placements Program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature. The behavioral health workforce is identified as a priority workforce area. Supporting individuals in the behavioral health pipeline throughout their educational attainment and career development is essential to increasing the pool of available behavioral health professionals working to serve the needs of the Commonwealth. The Behavioral Health Field Placements program will provide grants to Massachusetts public and private institutions of higher education (IHEs) to cover the cost of required internship credit hours and provide cost of attendance supports to Bachelors and Masters-degree level students participating in internships, apprenticeships and practicums that provide hands-on experience in high-need behavioral health settings.

DEFINITIONS

ELIGIBLE INSTITUTION:

Accredited public and private higher education institutions located in the Commonwealth and authorized to grant degrees that offer eligible programs, listed below:

AMERICAN INTERNATIONAL COLLEGE
ANNA MARIA COLLEGE
ASSUMPTION UNIVERSITY
BAY PATH UNIVERSITY
BERKLEE COLLEGE OF MUSIC
BOSTON COLLEGE
BOSTON GRADUATE SCHOOL OF PSYCHOANALYSIS INC
BOSTON UNIVERSITY
BRIDGEWATER STATE UNIVERSITY
CAMBRIDGE COLLEGE
COLLEGE OF OUR LADY OF THE ELMS
EMMANUEL COLLEGE
FITCHBURG STATE UNIVERSITY
FRAMINGHAM STATE UNIVERSITY
GORDON COLLEGE
GORDON-CONWELL THEOLOGICAL SEMINARY
HARVARD UNIVERSITY
LESLEY UNIVERSITY
MASSACHUSETTS COLLEGE OF LIBERAL ARTS

MCPHS UNIVERSITY
MERRIMACK COLLEGE
MGH INSTITUTE OF HEALTH PROFESSIONS
NORTHEASTERN UNIVERSITY
REGIS COLLEGE
SALEM STATE UNIVERSITY
SIMMONS UNIVERSITY
SMITH COLLEGE
SPRINGFIELD COLLEGE
SUFFOLK UNIVERSITY
TUFTS UNIVERSITY
UNIVERSITY OF MASSACHUSETTS-AMHERST
UNIVERSITY OF MASSACHUSETTS-BOSTON
UNIVERSITY OF MASSACHUSETTS-DARTMOUTH
WESTERN NEW ENGLAND UNIVERSITY
WESTFIELD STATE UNIVERSITY
WILLIAM JAMES COLLEGE
WORCESTER STATE UNIVERSITY

ELIGIBLE PROGRAM:

Behavioral health or related degree or certificate programs, inclusive of mental health and substance use disorder (SUD)/opioid use disorder (OUD) treatment programs, that require work-place based internships, apprenticeships, or practicum credit hours as a condition for program completion, including but not limited to the following:

- Bachelor's level
 - Social Work
 - Clinical/Counseling Psychology
 - Applied Behavioral Analysis
 - Occupational Therapy
 - Substance Use/Addiction Counseling
 - Art/Music Therapy
- Master's level
 - Master's level Social Work
 - Mental Health Counseling
 - Substance Abuse Counseling
 - Addictions Counseling
 - Marriage and Family Therapy/Counseling
 - Rehabilitation Counseling
 - Psychoanalysis
 - Master's level Psychiatric/Mental Health Nursing programs

Or any other programs that directly name behavioral health, mental health or substance use treatment as its specific area of inquiry and require one or more field placements as a degree requirement.

Program	CIP Code
College Student Counseling and Personnel Services	13.1102
Student Counseling and Personnel Services, Other	13.1199
Pastoral Studies/Counseling	39.0701
Clinical Psychology	42.2801
Counseling Psychology	42.2803
School Psychology	42.2805
Educational Psychology	42.2806
Health/Medical Psychology	42.2810
Forensic Psychology	42.2812
Applied Behavior Analysis	42.2814
Clinical, Counseling and Applied Psychology, Other	42.2899
Social Work	44.0701
Youth Services/Administration	44.0702
Substance Abuse/Addiction Counseling	51.1501
Community Health Services/Liaison/Counseling	51.1504
Marriage and Family Therapy/Counseling	51.1505
Psychoanalysis and Psychotherapy	51.1507
Mental Health Counseling/Counselor	51.1508
Mental and Social Health Services and Allied Professions, Other	51.1599
Community Health and Preventive Medicine.	51.2208
Maternal and Child Health	51.2209
Behavioral Aspects of Health	51.2212
Art Therapy/Therapist	51.2301
Music Therapy/Therapist	51.2305
Occupational Therapy/Therapist	51.2306
Therapeutic Recreation/Recreational Therapy	51.2309
Vocational Rehabilitation Counseling/Counselor	51.2310
Rehabilitation and Therapeutic Professions, Other	51.2399
Psychiatric/Mental Health Nurse/Nursing	51.3810
Geriatric Nurse/Nursing	51.3821

ELIGIBILITY REQUIREMENTS

To be eligible for the Behavioral Health Field Placements program, the student must:

- a) be enrolled in an eligible institution, as defined;

- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law² annually;
- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an eligible behavioral health program of study leading to a baccalaureate or graduate level degree; and
- h) meet Satisfactory Academic Progress (SAP) according to institution's requirements and federal standards.

PROGRAM CONDITIONS

- Disbursement of funds: Support for Behavioral Health Field Placements Program funding is to be allocated to participating institutions through a formula or process approved by the Commissioner of Higher Education;
- Support for Behavioral Health Field Placements Program funds allocated during an academic year must be committed to students by institutions and expended at the conclusion of the academic year;
- The institution is required to report recipient, programmatic, and other data to the Department of Higher Education (DHE) upon request, and no less than on a quarterly basis;

¹ M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

² For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity>

- Institutions shall facilitate access to on-campus support services to students who receive assistance under the Support for Behavioral Health Field Placements Program, to promote persistence in and completion of their program of study;
- The institution is responsible for verifying student eligibility;
- Support for Behavioral Health Field Placements Program funds may be awarded to support summer enrollment that occurs prior to the end of the corresponding academic year, if funds are available; and
- Institutions are required, upon request, to submit data to the Department of Higher Education to demonstrate maintenance of fiscal effort in their commitment to institutional aid to students, while participating in the Support for Behavioral Health Field Placements Program.

AWARD VALUE

Pursuant to an interagency service agreement between the Executive Office of Health and Human Services and the Department of Higher Education, the Board of Higher Education is authorized to award up to \$5,000 for each semester in which a student enrolls in and completes a degree-required workplace-based internship, apprenticeship, or practicum credit hours, subject to a maximum of \$10,000 per academic year, and \$20,000 per recipient across two academic years.

AWARD DISBURSEMENT

Participating institutions must verify that each recipient is eligible in accordance with guidelines established for the Behavioral Health Field Placements program, and that the student is enrolled in an approved behavioral health program and completing an eligible behavioral health placement.

Institutions are required to refund to the Department any funds that are deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible for the program. Behavioral Health Field Placement stipends may be awarded to support trailing summer enrollment that occur prior to the end of the corresponding fiscal year, if funds are available.

AWARD PRIORITY

In the event that the fiscal year appropriation is not sufficient to permit a full award to each eligible student, the institution shall prioritize assistance to students meeting all of the award priority criteria noted as follows:

- Students who are culturally/linguistically diverse

- Students living within or completing field placements within [Advancing Health Equity in Massachusetts Priority Geographies](#) municipalities
- Students enrolled in programs requiring 2 or more semesters of practicum (i.e. \$10k/year)

Subject to available funding, eligible students that meet some of the criteria may also be eligible for a partial award at the discretion of the institution.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Support for Behavioral Health Field Placements program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Behavioral Health Field Placements Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Behavioral Health Field Placements program.
- b) The Commissioner shall require each institution to furnish annually to the BHE a report detailing specific information regarding recipients of the Behavioral Health Field Placements program. OSFA will establish the timeline, specifications, and procedures for this report, which shall include the list of eligible institutions receiving allocations, the amount of funds allocated to each institution, the number and type of behavioral health degree programs supported at each institution by CIP code and credential level, the number of students supported by each program at each institution, aggregate demographic information about students participating in the program, enrollment status and graduation rates of students supported by each program, information about field placements including program, type, healthcare setting, and location, and student-level information including but not limited to employment status, role, and location.
- 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 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.

Massachusetts Assistance for Student Success Program

XXVI. Community College Nursing Scholarship Program

BOARD OF HIGHER EDUCATION COMMUNITY COLLEGE NURSING SCHOLARSHIP

PURPOSE

The Community College Nursing Scholarship program is designed to attract, incentivize, and encourage a diverse population of students to enroll in and complete a postsecondary credential or degree in the Nursing profession at Massachusetts community colleges. The Program provides “last dollar” financial assistance to ensure that all eligible students have adequate resources to fully cover the direct costs of tuition, fees and books towards a certificate or associate degree at a public community college. This Scholarship program is intended to encourage more students to consider the Nursing Health Profession as a viable career path and thus enroll in an approved nursing discipline that will provide the credentials to contribute to the Commonwealth’s workforce.

DEFINITIONS

ELIGIBLE INSTITUTION:

A community college within the Massachusetts public system of higher education under Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

An approved certificate or associate degree program offered at a Massachusetts community college, in the following areas, as well as other programs identified by the college as nursing or pre-nursing:

Registered Nursing/Registered Nurse

Licensed Practical/Vocational Nurse Training

Nursing Assistant/Aide

Patient Care Assistant/Aide/Technician

Pre-Nursing Studies

CIP Codes for eligible certificate or degree programs include the following:

513801 Registered Nursing/Registered Nurse

513901 Licensed Practical/Vocational Nurse Training

513902 Nursing Assistant/Aide and Patient Care Assistant/Aide

511105 Pre-Nursing Studies

ELIGIBILITY REQUIREMENTS

To be eligible for the Community College Nursing Scholarship Program, the student must:

- a) be enrolled in an eligible institution, as defined;

- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;
- e) comply with all applicable financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) has not earned a prior associate or baccalaureate degree, or the equivalent;
- h) enroll, as a matriculated student, on a full-time or part-time basis (minimum of 6 credits, or the equivalent) in an undergraduate program of study leading to a certificate or an associate degree, as defined;
- i) meet satisfactory academic progress (SAP) according to the institution's requirements and Federal standards; and
- j) have a balance owed to the institution for the costs of tuition, fees, books and supplies after all other non-loan grant and scholarship aid has been accounted for.

NURSING SCHOLARSHIP CONDITIONS:

- Disbursement of funds: the Community College Nursing program funds are to be appropriated to participating institutions through a formula approved by the Commissioner of Higher Education.
- The institution is required to report recipient data to the Department of Higher Education upon request, and on an academic term basis.
- The institution should facilitate access to on campus support services to students who receive assistance under the Nursing Scholarship program, to promote persistence in and completion of their program of study.
- The institution is responsible for verifying student eligibility, to include accurate determination of prior education credentials earned.

- The Community College Nursing program funds may be awarded to support trailing summer enrollment.
- The Community College Nursing program funds must be committed by institutions and expended by August 31 of each fiscal year.

STUDENT ELIGIBILITY BY ENROLLMENT INTENSITY

Students may be awarded Community College Nursing Scholarship funds as follows:

Associate Degree

Full-Time: Maximum of 3 years, 6 semesters for full-time (12 enrolled credits per academic term). An additional year of assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

Part-Time: Maximum of 5 years, 10 semesters for part-time (6 enrolled credits minimum per academic term). An additional year of assistance may be awarded based on extenuating circumstances, with approval of a written appeal.

Certificate Program

Full-Time: Maximum of three semesters (summer enrollment does not count toward the 3-semester maximum)

Part-Time: Maximum of six semesters (summer enrollment does not count toward the 5-semester maximum)

AWARD VALUE

Subject to appropriation, the Community College Nursing Scholarship assistance awarded to eligible students under this program shall not exceed the calculated cost of tuition, fees, books and supplies as published in the institution's annual Cost of Attendance (COA), for the academic term, during which the award is made.

Community College Nursing Scholarship funds may not be used to cover educational expenses that are not related to tuition and fees, books and supplies, unless otherwise approved or authorized by the Commissioner of Higher Education, or his designee.

Community College Nursing funds may be awarded to cover student expenses or activities related to the required program of study, such as internships or clinical placements, that are scheduled during the summer months. Eligible students may also receive funds to complete coursework during the summer (six-credit minimum).

AWARD CALCULATION

An eligible student enrolled in an undergraduate program of study leading to a certificate or associate degree may receive a Community College Nursing Scholarship award to cover Financial Unmet Need for costs associated with tuition and fees, books and supplies for the

corresponding academic term or year. The Financial Unmet Need calculation for an eligible student is as follows:

Community College Nursing Scholarship Award = Tuition, Fees, books and supplies (minus) all other Non-Loan aid

AWARD DISBURSEMENT

Each participating institution must verify that the recipient is eligible in accordance with guidelines established for the Community College Nursing Program, and that the student is enrolled, or plans to enroll, in an approved certificate or associate degree program. Further, the institution is required to verify that the student has not earned a prior associate or bachelor's degree before funds are awarded and disbursed.

Institutions are required to refund any funds deemed to have been improperly awarded and disbursed to recipients who are later determined to be ineligible.

ANNUAL REVIEW

The Department of Higher Education (DHE) is responsible for evaluating the effectiveness of the Community College Nursing Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the DHE or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Community College Nursing Scholarship Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each college and university to maintain documentation of a recipient student's eligibility for the Community College Nursing Program.
- b) The Commissioner shall require each campus to furnish annually to the Board of Higher Education a report detailing specific information regarding recipients of the Community College Nursing Program. OSFA will establish the timeline, specifications, 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.

Massachusetts Assistance for Student Success Program

XXVII. In-Demand Scholarship

**BOARD OF HIGHER EDUCATION
MASSACHUSETTS IN-DEMAND SCHOLARSHIP PROGRAM**

PURPOSE

The Massachusetts In-Demand Scholarship Program was created by the Massachusetts Legislature in the 2024 Fiscal Year Budget to support economic development in the Commonwealth by providing financial assistance to residents who are pursuing programs of study that will help address the Commonwealth's workforce needs. The program will provide scholarships to students to encourage enrollment and completion of training and degree programs identified by the Massachusetts Executive Office of Labor and Workforce Development's annual reports on labor market conditions, who intend to remain in the Commonwealth to pursue their professional careers.

DEFINITIONS

ELIGIBLE INSTITUTION:

Any public four-year or two-year college or university within the Massachusetts public system of higher education, as identified in Section 5 of Chapter 15A of the General Laws.

ELIGIBLE PROGRAM:

Any undergraduate or graduate degree or certificate program offered by an eligible institution and identified by the Massachusetts Executive Office of Labor and Workforce Development (EOLWD) as an in-demand profession or occupation.

ELIGIBILITY REQUIREMENTS

To be eligible for the In-Demand Scholarship program, the student must:

- a) Be an undergraduate or graduate student who has been admitted to an eligible institution, as defined;
- b) physically reside in Massachusetts for at least one year, as of the start of the enrolled term, with an intent to remain in Massachusetts consistent with Board of Higher Education (BHE) policy;
- c) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law or otherwise;
- d) complete the Free Application for Federal Student Aid (FAFSA) or the Massachusetts Application for State Financial Aid (MASFA) as applicable for eligible students under the Massachusetts Tuition Equity Law annually;

- e) comply with financial aid verification requirements;
- f) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- g) have declared a major or be currently pursuing a program of study offered and verifiable by the institution that is designated as an in-demand profession by the Massachusetts Executive Office of Labor and Workforce Development; and
- h) achieves and maintains a minimum college-level GPA of 3.0 annually and demonstrates Satisfactory Academic Progress in accordance with institutional standards.

AWARD VALUE

Awards for eligible applicants under this program may be used to support the full cost of tuition and fees charged to a student, plus a \$1,200 allowance for books and supplies for the academic term (year or semester), as follows:

- Maximum of four years (eight semesters) for full-time undergraduate students enrolled in a 4-year college or university; or maximum of two years (four semesters) if enrolled in a community college.
- Maximum of six years (twelve semesters) for part-time undergraduate students enrolled in a 4-year college or university; or four years (eight semesters) if enrolled in a community college; minimum of six credits per term is required for part-time students.
- Maximum of two years (four semesters) for graduate students, minimum of six credits per semester required.

Students may receive an additional payment up to a maximum of \$2,500 to support a trailing academic summer term of study if funds are available after all academic year awards are disbursed. Summer awards are limited to a maximum of two terms (one per academic year) for any student.

The academic year and/or semester awards for this program may be modified by the Department of Higher Education in accordance with the award procedure, below, if the annual appropriation for this program is not sufficient to meet the maximum scholarship award for the pool of eligible students.

The Department of Higher Education will annually review the program. Including institutional cost of attendance and may adjust the program's award values as it deems necessary.

AWARD PROCEDURE

Scholarships under this program shall be awarded only to students who meet all program eligibility criteria, and prioritized based on the following:

- Awarded to students who demonstrate high financial need, based on the reported Expected Family Contribution (EFC), to promote access to scholarship funds by diverse populations within academic levels (year of study such as first year, sophomore, junior, or senior), as determined by the Department of Higher Education
- Awarded in proportion to the labor and workforce demand for each discipline or profession, based on data provided by the Executive Office of Labor and Workforce Development, as determined by the Department of Higher Education
- Awarded based on demonstrated student potential for excellence in the discipline or profession, including high academic achievement.

Institutions are required to adjust a student's financial aid package, if the sum total of all financial aid, including the In-Demand Scholarship, results in an "over award", as defined under Title IV regulations governing federal aid, and related state financial aid policies.

INSTITUTIONAL DISBURSEMENT OF SCHOLARSHIPS

- Each participating institution must certify that the recipient is eligible in accordance with guidelines established for the In-Demand Scholarship program and verify that the student is pursuing a program of study in a designated and approved in-demand profession.
- Academic year awards will be disbursed in equal payments for the fall and spring semesters. Institutions are required to comply with the Office of Student Financial Assistance's refund policy for any scholarship recipient who is no longer eligible for funds, or who is no longer enrolled.
- In addition to completing the verification of enrollment status (credits and GPA) for students each semester, institutions are also responsible for providing the Department of Higher Education and the Office of Student Financial Assistance with related data for scholarship recipients, as requested and required under the annual Institutional Participation Agreement for Massachusetts State Financial Aid.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the In-Demand Scholarship program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance for this purpose. The program may be evaluated annually to

determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the In-Demand Scholarship program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the In-Demand Scholarship program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the In-Demand Scholarship program. OSFA will establish the timeline, specifications, 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 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.

Massachusetts Assistance for Student Success Program

XXVIII. Educator Loan Repayment Program

BOARD OF HIGHER EDUCATION EDUCATOR LOAN REPAYMENT PROGRAM

PURPOSE

The Educator Loan Repayment program is funded subject to the availability of funds and appropriation from the Massachusetts Legislature M.G.L. c. 15A, Section 16. The program provides financial assistance to educators in the repayment of college expense while prioritizing the recruitment and retention of a racially, culturally, ethnically and linguistically diverse educator workforce consistent with chapter 132 of the acts of 2019 to diversify the educator workforce.

DEFINITIONS

ELIGIBLE INSTITUTION:

Applicants must have graduated from 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:

An approved undergraduate degree program that leads to licensure or other form of certification issued by the Department of Elementary and Secondary Education

ELIGIBILITY REQUIREMENTS

To be eligible for the Educator Loan Repayment program, the student must:

- a) have received their undergraduate degree after January 2020 from an eligible institution, as defined;
- b) be a U.S. Citizen, lawful permanent resident, or non-citizen eligible under Title IV regulations; or have an approved eligibility status designated by the BHE pursuant to the Massachusetts Tuition Equity Law¹ or otherwise;
- c) not be in default on any federal or state student loans for attendance at any institution, or owe a refund for any previous state financial aid program;
- d) have outstanding educational debt that was incurred to pay tuition, fees, or additional costs of attendance as calculated by the institution of higher education, including, but not limited to, room and board, books and supplies, transportation, child care and personal; and
- e) commit to and work for 4 years in a school district, as defined in section 2 of chapter 70 of the General Laws, as a teacher, instructional or program paraprofessional, or in any

^[1] M.G.L. c. 15A, Section 9, as amended by Section 11 of Chapter 20 of the Acts of 2023, and further amended by Section 22 of Chapter 140 of the Act of 2024 For information on the Massachusetts Tuition Equity Law see here: <https://www.mass.edu/tuitionequity/>

other position that requires a license or other form of certification issued by the Department of Elementary and Secondary Education or other state agency;

If funds appropriated are insufficient to award all applicants priority shall be given to educators working in school districts with higher shares of students who are designated as low income, as defined in said section 2 of said chapter 70.

EDUCATOR LOAN REPAYMENT CONDITIONS

- Recipient must apply annually; up to four years.
- Recipient must maintain active full time status as a full time classroom teacher, instructional or program paraprofessional, or in any other position that requires a license or other form of certification issued by the department of elementary and secondary education or other state agency at a Massachusetts public school district.
- Recipient must annually provide proof of their active full-time status as a Massachusetts public school district full time classroom teacher, instruction or program paraprofessional, or in any other position that requires a license or other form of certification issued by the department of elementary and secondary education.
- Recipient must annually provide proof of their outstanding educational debt that was incurred to pay tuition, fees, or additional costs of attendance as calculated by the institution of higher education, including, but not limited to, room and board, books and supplies, transportation, child care and personal expenses while enrolled in an undergraduate or post baccalaureate program at an eligible institution.
- Award amounts shall not exceed \$7500 per year and may be modified based upon funding availability or other circumstances.
- Payment will be made annually only after the educator provides verification of satisfactory completion of a full year of teaching. If an educator does not complete the full year of teaching, the repayment assistance is forfeited for that year.
- The total amount of awards made to any one recipient shall not exceed the total indebtedness remaining for that recipient.

AWARD VALUE

Award amounts shall not exceed \$7500 per year and may be modified based upon funding availability or other circumstances.

Payment will be made annually only after the educator provides verification of satisfactory completion of a full year of teaching. If an educator does not complete the full year of teaching, the repayment assistance is forfeited for that year.

The total amount of awards made to any one recipient shall not exceed the total indebtedness remaining for that recipient.

Loan repayment assistance shall be in the form of payments from the state to the federal government servicer of an educator who has received the award and shall be considered a payment on behalf of the educator.

AWARD DISBURSEMENT

Payment will be made annually only after the educator provides verification of satisfactory completion of a full year of teaching. If an educator does not complete the full year of teaching, the repayment assistance is forfeited for that year.

Loan repayment assistance shall be in the form of payments from the state to the federal government servicer of an educator who has received the award and shall be considered a payment on behalf of the educator.

ANNUAL REVIEW

The Department of Higher Education is responsible for evaluating the effectiveness of the Educator Loan Repayment program. Institutions that have signed an agreement to participate in the Massachusetts State financial aid programs are required to share data for all students with the Massachusetts Department of Higher Education (DHE) or its designee, and the Office of Student Financial Assistance (OSFA) for this purpose. The program may be evaluated annually to determine any immediate impact or to determine if adjustments are required for various processes, such as disbursement of funds.

PARTICIPATION AGREEMENT

All institutions receiving funds under the Educator Loan Repayment Program must have an active Massachusetts State Financial Aid Participation Agreement on file with the Massachusetts Office of Student Financial Assistance (OSFA).

AUDIT REQUIREMENT

- a) It shall be the responsibility of each college to maintain documentation of a recipient student's eligibility for the Educator Loan Repayment program.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Educator Loan Repayment program. OSFA will establish the timeline, specifications, 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 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.