

Christian A. Herter Memorial Scholarship

BOARD OF HIGHER EDUCATION

Massachusetts Office of Student Financial Assistance

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;

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- b) (1) be a U.S. Citizen, permanent legal resident, or non-citizen eligible under Title IV regulations and 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; or (2) have an approved eligibility status designated by the Board of Higher Education pursuant to Section 9 of Chapter 15A, as amended by Section 11 of Chapter 28 of the Acts of 2023;
- c) 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);
- 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) 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;
- h) 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;
- i) 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;
- j) 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 MASSGrant 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.

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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 (DHE) 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 institutions receiving funds under the Christian A. Herter 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 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.