

Gilbert Matching Scholarship Grant

BOARD OF HIGHER EDUCATION

Massachusetts Office of Student Financial Assistance

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:**
The period between July 1 of one year and June 30 of the subsequent year
- **Act:**
The General Appropriation Act for a fiscal year
- **Commissioner:**
The Commissioner of the Department of Higher Education appointed pursuant to M.G.L. c. 15A s.4.
- **Eligible Institution:**
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

Guidelines Effective August 1, 2026 (BHE 27-05)

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:**
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:**
The 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 at an eligible institution, as defined;
- 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) annually;
- d) comply with financial aid verification requirements;
- e) not be in default on any federal or state student loans or owe a refund for any previous state financial aid programs;

Guidelines Effective August 1, 2026 (BHE 27-05)

- f) not have earned a bachelor's degree (or the equivalent);
- g) demonstrate financial need in accordance with guidelines, as specified;
- 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.

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 Gilbert Matching Scholarship Grant Program (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

Guidelines Effective August 1, 2026 (BHE 27-05)

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;

Guidelines Effective August 1, 2026 (BHE 27-05)

- 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 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 received for scholarship aid to needy Massachusetts students.
- 2) To comply with these Guidelines, the GMSGP 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.

Guidelines Effective August 1, 2026 (BHE 27-05)

- 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 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 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.
- b) The Commissioner shall require each college to furnish annually to the BHE a report detailing specific information regarding recipients of the Gilbert 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.