



FINANCIAL AID GUIDANCE MEMO

REFERENCE: FA 20-006
TOPIC: CHOOSE OHIO FIRST SCHOLARSHIP (COF)
AUTHOR: COREY DIXON, PROJECT MANAGER
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RELEVANT STATUTE: OHIO REVISED CODE SECTIONS 3333.60 – 3333.69

The Choose Ohio First Program

Ohio Revised Code 3333.61 establishes the Choose Ohio First Scholarship Program as a component of the Ohio Innovation Partnership. Through a competitive process described in Ohio Revised Code 3333.62, the Choose Ohio First Scholarship Program assigns a number of scholarships to universities and colleges to recruit Ohio residents as undergraduate students in the fields of science, technology, engineering, mathematics, medicine (STEMM), or STEMM Education fields. Please note: guidance for Choose Ohio First PCMH Medical and Nursing is in a separate guidance memo.

Choose Ohio First scholarships are student-centered grants from the state for participating eligible students to attend a university or college. As such, Choose Ohio First Scholarships are awarded to each participating eligible student as a grant to the state university or college the student is attending and are reflected on the student's tuition bill.

Ohio Administrative and Revised Codes

Throughout the Ohio Administrative and Revised Code, there are several references to the Chancellor establishing rules for various aspects of the program. The COF Revised Code can be found at: <http://codes.ohio.gov/orc/Search/3333.60> and the COF Administrative Code can be found at: <http://codes.ohio.gov/oac/3333-1-61v1>.

Update Award Amounts

Through the competitive process, each college or university establishes the scholarship amount for its designated Choose Ohio First STEMM or STEMM education majors. **For the 2019-2020 academic year:**

- For scholars who have received their COF scholarship toward a baccalaureate or associate degree, a minimum per student award of \$1,500.00 per academic year from ODHE dollars. If a student attends only one term, they must receive the minimum of \$1,500.00 (with no refund check from COF money) or they cannot receive an award, including seniors in their final term.
 - This minimum amount does not need to be given within one term. As long as each student receives at least \$1,500 between summer, fall, and spring terms, compliance with ORC 3333.66 has been met.
- For scholars who have received their COF scholarship toward a certificate program, a minimum per student award of \$500.00 per academic year from ODHE dollars. If a student attends only one term, they must receive the minimum of \$500.00 (with no refund check from COF money) or they cannot receive an award, including seniors in their final term.
 - This minimum amount does not need to be given within one term. As long as each student receives at least \$500.00 between summer, fall, and spring terms, compliance with ORC 3333.66 has been met.
- A maximum per student award of \$7,955.00 per academic year from ODHE dollars. Per Ohio Revised Code 3333.66, this is calculated annually as one-half of the highest in-state undergraduate instructional and general fees charged by all state universities.
- Modifications to the project budget must be approved by ODHE.

***Update* Institutional Match**

The institution is required to provide a match in a 1 to 1 ratio for each ODHE dollar received. All reasonable institutional, operational, and capital costs that are directly associated with delivering the project outcomes identified in the institution's Choose Ohio First proposal may, in ODHE's discretion, be counted as eligible institutional match. Institutional match may exceed the total amount awarded to the institution. The value of institutional, public, or private industry cooperative work experiences and internships shall count toward the statewide aggregate amount of other institutional, public, or private money. Institutional match can be accounted for on a yearly, rather than term-by-term, basis, and must take place in the fiscal year in which the COF funding was provided. Examples of institutional match include but are not limited to:

- Scholarship/Tuition Assistance
- Salaries - Key Personnel (project director/coordinator, faculty, mentors, and others) as it relates directly to the project outcomes including approved CIP codes and the percentage of COF scholars served
- Benefits - Key Personnel (project director/coordinator, faculty, mentors, and others) as it relates directly to the project outcomes including approved CIP codes and the percentage of COF scholars served
- Salaries - Support Personnel (staff from financial aid, accounting, and, other areas that support COF but do not have programmatic oversight) as it relates directly to the project outcomes including approved CIP codes and the percentage of COF scholars served
- Benefits - Support Personnel (staff from financial aid, accounting, and other areas that support COF but do not have programmatic oversight) as it relates directly to the project outcomes including approved CIP codes and the percentage of COF scholars served
- Contractual Services
- Equipment/Rental, Lease, Purchase
- Supplies and Materials
- Employee Travel
- Student Travel

Matching funds provided by institutional partners (public or private) may also be counted toward institutional match. Examples of partnership matching funds include, but are not limited to:

- Paid co-op or internship experiences
- Equipment donated to the program
- Donated time (salaries and benefits) for external partners contributing to the educational program

Scholarship Use

Beyond instructional and general fees, book vouchers, and meal plans are approved as an eligible use of COF funds. However, there must be a notification on the student's tuition bill indicating this use. The entire grant must be used for scholarships, fellowships, grants, or other monetary or nonmonetary incentives to students, and not for administration.

General fees are defined as those assessed uniformly to all students and those that *do not allow* for a waiver to be offered to any student(s). For example, a fee charged to students to provide health care coverage would not be considered to be uniformly assessed if students can opt out, and therefore would not be considered a general fee.

COF Funding is primarily for undergraduate studies. If a scholar falls within the parameters of the exception mentioned below under "Eligibility Requirements" for graduate students, they can receive funding. For undergraduate students dually enrolled in a bachelor and master's program, their COF eligibility would be based on the number of credit hours being applied to their undergraduate courses.

Study Abroad and Internships

Students are eligible for COF funding during study abroad terms as long as the institution keeps documentation showing courses taken and tuition charges incurred at the study abroad institution. Tuition charges must be indicated on the student's tuition bill and, in keeping with federal guidelines, the institution must keep this documentation in the event of an audit.

Students are eligible for COF funding during terms they are on co-op or internship if they are paying tuition for that term. It is up to the discretion of the institution whether they want to provide COF funding during terms that scholars are on co-op or internship.

***Update* Eligibility Requirements**

- COF is only eligible for those who qualify for in-state tuition and Ohio residents who meet OAC criteria: <http://codes.ohio.gov/oac/3333-1-10>.
- Scholar must be an undergraduate Ohio resident or an Ohio resident returning to Ohio for graduate school after completing undergraduate studies in other states or countries.
- Scholar can be enrolled in full-time or part-time study.
- Scholarships are for first year students only (first time degree seeking at the institution or internal transfers to an approved STEM major) at the date of the initial COF cohort awards. These scholars may finish their degree provided each scholar maintains compliance with the requirements of the Award Agreement as well as the requirements of the institution.
 - Former College Credit Plus (CCP) students are eligible for COF funding because COF considers them first-time, first-year students as they were not degree seeking when they were enrolled in CCP classes.
 - If students, including transfers, are recruited during the middle of an academic year, the students should be placed on a waiting list so that they are eligible for COF funding when the next cohort is awarded.
- It is recommended that Scholars maintain a cumulative grade point average (GPA) of 3.0 or higher. If a student falls below this cumulative GPA, the institution must submit a scholar support plan each term via secure file transfer to <https://heifx.ohiohighered.org>, detailing a plan to bolster the student's GPA. A student support plan should indicate:
 - Institution
 - Choose Ohio First Scholar's Name
 - Award #
 - Term
 - Degree Level
 - Name of Program
 - CIP code
 - Cumulative GPA
 - Anticipated graduation year/term
 - **Notes as to the plan the institution will facilitate to support the individual scholar in raising their GPA.** This plan should indicate COF specific resources and may include:
 - Awareness of the current GPA and any external factors the institution is aware of that may be impairing academic success
 - COF specific resources including advising, peer mentoring, or success labs
 - Progress review meetings
 - Formative assessments
 - Study skills
 - Enrichment workshops
- Scholar must maintain enrollment in a STEM major and Classification of Instructional Program (CIP) Code for which the college or university sought and gained approval through the competitive process for program awards (as outlined in the institution's award agreement).
 - A Choose Ohio First Scholar may change majors and remain eligible if the program is an approved STEM major and the approved CIP Code is outlined in the institution's award agreement.

- If a scholar changes out of an approved CIP code major or withdraws from the academic program mid-year, the student will lose the scholarship for future terms and the institution will not be able to re-allocate those funds to another student.
- Institution will inform each student of scholarship requirements and events that may eliminate the availability of the scholarship in future terms or years, including lack of funding from the state and performance by Awardee.
- At the end of each academic year, ODHE will request a teach-out list containing all new scholars admitted into that academic year's COF cohort.

STEMM Majors & Approved CIP Codes

Institutions will only be reimbursed for scholars who are enrolled in CIP codes approved in the institution's current award agreement. Any scholar submitted for payment under a CIP code not in the institution's award agreement will not be provided payment.

- Student CIP codes submitted for payment need to match what is in the award agreement. For public institutions, data submitted in HEI and the COF payment system (CIP codes and degree level) should match.

***Update* Payment Submissions and Reimbursement**

- The institution must submit the required data in the Choose Ohio First Scholarship Data and Reporting System by the deadline. Any requests received after such time will may not be reimbursed. ODHE will distribute funds within 60 days of receipt of a complete and accurate student data form.
- Windows for payment submission open the day after the end of each term and remain open through the end of the term's HEI Enrollment Area. Check the COF Payment System website for your institution's current window.
 - Summer semester windows close on October 1
 - Autumn semester windows close on March 1
 - Spring semester windows close on September 1
- Once your window is closed, it may not be reopened and you may not be able to submit students for reimbursement. If you need to request an extension due to extenuating circumstances, a request must be made to the project manager before your window closes.
- Please be sure all student payment data (especially CIP code and degree level) are accurate and match HEI (for public institutions).
- Teach out lists for continuing scholars from all COF awards are to be submitted to ODHE by June 1st annually.
- Any scholars continuing from prior years must be on the teach-out lists submitted to ODHE and must be submitted with correct award numbers.

Repayments of Over Awards

If the institution has previously submitted a payment request that is greater than the amount the student was eligible to receive for that term, the institution must submit a listing of these overpayments via secure file transfer to <https://heifx.ohiohighered.org/>. When the payment request for the following term is submitted, these overpayments must be reflected on the payment template as negative numbers and will be subtracted from the total payment request. The listing of overpayments must include:

- Institution
- Scholar name(s);
- Award #
- Term overpayment occurred; and
- Reason for overpayment

If the institution is not expecting a disbursement for the remainder of the academic year or the refund is for a previous academic year, any outstanding amounts owed should be sent by check to the project manager's attention and payable to:

Ohio Department of Higher Education
Office of Financial Aid
25 South Front Street - 2nd Floor
Columbus, Ohio 43215-4183

Program Accountability

- The Chancellor's reporting requirements for the Choose Ohio First Scholarship Program require each awarded college or university to:
 - Submit appropriate data to HEI and COF Reporting System according to timelines established for those reporting periods;
 - Submit an Annual Report inclusive of fiscal and performance measures using the required template that will be sent out at the end of the academic year; and
 - Fulfill pledges of other institutional, public, or nonpublic resources and report on the Annual Report.

HEI Secure File Transfer Site

A student's full social security number should never be sent in an e-mail. Secure files can be uploaded to the following site: <https://heifx.ohiohighered.org/> Log in to the site with your COF system username and password, and select 'Choose Ohio First' where it says 'Associate with Program.'

Financial aid personnel should direct questions to Corey Dixon, Project Manager at 614.644.5704, cdixon@highered.ohio.gov