

FINANCIAL AID GUIDANCE MEMO

REFERENCE: **FA21-007**
TOPIC: **CHOOSE OHIO FIRST SCHOLARSHIP (COF)**
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DATE: **05 AUGUST 2020**
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 assigned several 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

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 2020-2021 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. If each student receives at least \$1,500 between summer, fall, and spring terms, the institution complies with ORC 3333.66.
- 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. If each student receives at least \$500.00 between summer, fall, and spring terms, the institution complies with ORC 3333.66.
- A maximum per student award is \$8,112.00 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, by way of an amendment being fully executed by the parties. Awardee may modify, without an amendment, individual student scholarship amounts in compliance as long as scholarship amounts fall within the minimum and maximum award amounts set in ORC 3333.66.

- Requests for modification shall be made in writing to the project administrator identified in Article III.
- ODHE reserves the right to make budget modifications based on annual evaluations of the performance of the institution. Modifications will be made to better attain the goals and objectives of the Project and of the State of Ohio. ODHE shall notify Awardee of any budget modification to its funding for student COF scholarships. Awardee should not communicate the awards to students until ODHE has released budget notifications or modifications.

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 an annual, rather than term-by-term, basis, and must be expended in the fiscal year in which the COF funding was provided. All matching funds institutional and partners must be supported by appropriate documentation and records.

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
- COF scholar research, internship, and co-op wages

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. The student's tuition bill shall reflect all eligible costs 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 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 if the institution maintains 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 provide COF funding during terms that scholars are on co-op or internship.

***Update* Eligibility Requirements**

- COF scholars must qualify for in-state tuition and be 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.
- Scholars can be enrolled in full-time (12+ credit hours) or part-time (anything less than 12 credit hours) study.
- Scholarships are only eligible to first year students, institutional and external transfer students, and students seeking certificates. The funds will be used to support those students with finishing their degree or certificate.
 - A COF scholarship may be awarded to a current institutional student transferring from a different Classification of Instruction Program (“CIP”) into a CIP covered by an institution’s agreement. An institutional transfer student must be at least a second-year student. Transfers should result in increased enrollment within the CIP code.
 - 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.
- It is encouraged 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 when submitting for reimbursement to the COF Payment System.
- Scholar must maintain enrollment in a STEMM 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 STEMM 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.
- 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 grantee.

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 and data submitted in HEI and the COF payment system (CIP codes and degree level) should match.

***New* New HEI System**

COF is now in the HEI system, which can be found at: <https://hei.ohiohighered.org>. The new payment system went live in July 2020, which will correspond with summer COF scholarship reimbursement requests. Spring 2020 reimbursement requests should still be submitted to the current COF payment system. A WebEx demonstration can be found here: <https://www.ohiohighered.org/hei/faqs-finaid> under HEI overview.

Payment Submissions and Reimbursement

- The institution must submit the required data in the [Choose Ohio First Payment System in HEI](#) by the deadline. Any requests received after such time will not be reimbursed. ODHE will distribute funds within 60 days of receipt of a complete and accurate student file.
- Windows for payment submission requests are listed below:
 - Summer semester window: July 1 to October 1
 - Autumn semester window: December 1 to March 1
 - Spring semester window: May 1 to September 1
- If a grantee needs to request an extension due to extenuating circumstances, a request must be made to the program manager before your window closes.
- Please be sure all student payment data (especially CIP code and degree level) are accurate and match HEI files

COF File and Error Codes

The COF payment file format, .csv file format, and error codes can be found at: https://www.ohiohighered.org/content/hei_file_documentation_choose_ohio_first

***New* Posting of Funds**

In alignment with federal policy, the institution should apply the funds requested as soon as administratively feasible but no later than three business days following the date the institution received those funds.

***Update* 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 refund adjustment must be submitted via the HEI system. When a refund adjustment is submitted in HEI during an academic year, the refund will be captured from the next COF disbursement. If no further disbursements will be made for the academic year, a refund check must be submitted to our office within 30 days of submitting the refund file. If after 45 days the refund check is not submitted, the amount owed plus interest and any additional fees may be turned over to the Ohio Attorney General’s Office for collection. Any outstanding amounts owed should be sent by check to the program 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'.