Choose Ohio First
General
Guidelines and Procedures
# TABLE OF CONTENTS

**Purpose of Manual**

**Choose Ohio First History and Overview**

**Choose Ohio First Policies and Procedures**
- Scholar Eligibility
- Scholarship Use
- Scholarship Amounts
- Disbursement of Scholar Awards
- Program Leadership
  - *The Program Coordinator*
  - *The Financial Aid Coordinator:*

**Choose Ohio First Funding**
- Reimbursement
  - *Data Reporters*
  - *Data Collection Template*
- STEM Majors & Approved CIP Codes
- Ongoing Monitoring and Review
- Annual Reporting

**Scholar Support**
- Student Support Services

**Appendix**
- Links to Related Documents and Sites
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST GENERAL

PURPOSE OF THE MANUAL

The purpose of this manual is to provide institutions of higher education with guidelines and procedures for the Choose Ohio First (COF) Scholarship Program. This manual describes the minimum requirements to ensure that participating institutions meet basic standards of program quality. The manual also describes the conditions requiring approval and the associated processes used to determine continued eligibility for offering COF funds.

CHOOSE OHIO FIRST HISTORY AND OVERVIEW

Choose Ohio First began in 2008 as a way to increase the number of Ohio students entering into and successfully completing science, technology, engineering, math or medicine (STEMM) majors at Ohio’s public and private colleges and universities. Details of the general COF program are outlined in the following sections of Ohio Revised Code: 3333.61 to 3333.69.

Ohio Revised Code 3333.61 establishes the Choose Ohio First Scholarship Program as a component of the Ohio Innovation Partnerships. 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, or in limited cases, graduate students for the fields of science, technology, engineering, mathematics, medicine, (STEMM) or STEMM Education.

- Choose Ohio First scholarships are student-centered grants from the state to students to use to attend a university or college and are not grants from the state to universities or colleges. Choose Ohio First Scholarships are awarded to each participating eligible scholar as a grant to the state university or college the student is attending and are reflected on the scholar’s tuition bill.

Through the competitive process, each college or university establishes the scholarship amount for its designated Choose Ohio First STEMM or STEMM education majors.

CHOOSE OHIO FIRST POLICIES AND PROCEDURES

The COF scholarship is a recruitment scholarship, and, as such, is not intended to be given to students who are current students at the institution. Institutions will be notified of award amounts for the upcoming academic year each October. This is intended to provide sufficient lead time for institutions to implement targeted recruitment strategies in order to recruit a new cohort (first years, transfers) to the institution for the upcoming school year.

Scholarship Eligibility

Eligibility to receive a Choose Ohio First Scholarship is limited to:

- 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) 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 to https://heifx.ohiohighered.org, detailing a plan to bolster the student’s GPA. If the institution is not including scholar SSNs, the spreadsheet can be emailed to the financial aid program manager (mjohnson@highered.ohio.gov). A student support plan should indicate:
  - Institution
  - Choose Ohio First Scholar’s Name
  - Award #
  - 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 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 and the institution will not be able to re-allocate those funds to another student. It is the institution’s responsibility to communicate this policy to students before they make such decisions.

- Scholar cannot be paid out of more than one Choose Ohio First award to an institution by the Ohio Department of Higher Education (ODHE) in any one academic year, including primary care awards.
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST GENERAL

- 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 (no later than June 1st), all colleges and universities must submit to ODHE teach out lists for continuing scholars from all COF awards. The list (in the form of a spreadsheet) must be uploaded to the following secure site: https://heifx.ohiohighered.org/ and must include:
  - Scholar name(s);
  - Award #
  - Cohort #
  - CIP Code
  - Scholar(s) anticipated year of program completion

- Graduate students are allowed on a limited basis as follows:
  - Ohio residents returning to Ohio for graduate school after completing undergraduate studies in other states or countries [Ohio Revised Code 3333.66 (B)(1)];
    - NOTE: Individuals who received undergraduate Choose Ohio First Scholarships are not eligible to receive Choose Ohio First Scholarships as graduate students unless they are enrolled in the program described in Ohio Revised Code 3333.611 or 3333.612.

Scholarship Use

Beyond instructional and general fees, book vouchers 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 in Ohio Revised Code 3333.66 (B)(1) 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.

Scholarship Amounts

- A minimum award of $1,500.00 per academic year
- A maximum award calculated at one-half the highest in-state undergraduate instructional and general fees charged by all state universities. An annual Choose Ohio First Guidance Memo will specify maximum award.
Disbursement of Scholar Awards

Choose Ohio First Scholarships are awarded to eligible students by the colleges and universities, and are reflected on the student’s tuition bill or statement. ODHE provides reimbursement to institutions at the end of each academic term for Choose Ohio First scholars, provided eligibility requirements are met.

Program Leadership

Each participating institution should identify two institutional points of contact for the Choose Ohio First Program:

- A Program Coordinator
- A Financial Aid Coordinator

Institutions must provide all relevant contact information to the state. All changes to these contacts must be requested in writing to the state. Other individuals may be listed as departmental contacts for scholars as it relates to specific program requirements; however, the program director or program coordinator and the financial aid coordinator will be the primary contacts between state leadership at the ODHE and the institution.

The Program Coordinator:

- Serves as the point of contact between the state and the institution
- Serves as the primary point of contact for student inquiries
- Serves as the administrative contact for all communications, questions, data requests and concerns
- Agrees to disseminate information to other individuals on the institution as necessary and collect data from other individuals as required
- Monitors funding levels
- Coordinates scholar application process
- Establishes an institutional review committee for the scholar application process
- Provides oversight for report submissions and other requirements
- Submits GPA support plans to ODHE for scholars with GPA under 3.0
- Ensures that information from the state level is disseminated to the appropriate contacts on institution (i.e., faculty, scholars, staff, etc.)
- Maintains program clarity by following Choose Ohio First marketing and branding standards, found here: [https://www.ohiohighered.org/cof/resources](https://www.ohiohighered.org/cof/resources)
- Stays apprised of any financial or programmatic changes through Choose Ohio First Guidance Memos, distributed annually through ODHE’s financial aid office

The Financial Aid Coordinator:

- Monitors funding levels
- Monitors payment requests for eligibility (degree level, CIP code, GPA)
- Processes scholar payment requests submitted into the COF data reporting system
- Communicates with program coordinator regarding eligibility issues and GPA support plans
- Stays apprised of any financial or programmatic changes through Choose Ohio First Guidance Memos, distributed annually through ODHE’s financial aid office
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST GENERAL

CHOOSE OHIO FIRST FUNDING

Reimbursement

The primary vehicle for capturing student data and demographic information for payment is the COFS Payment and Tracking System found here: https://chooseohiofirst.ohiohighered.org. The COFS Payment and Tracking System is used for the upload of data and reimbursement requests for Choose Ohio First institution. A user manual can be found here: https://www.ohiohighered.org/cof/resources. The site collects data elements critical to the monitoring of the success of Choose Ohio First, and is in compliance with various laws and statutes. Institution should make scholars aware of data collection, as some information regarding the demographic background of the scholar is self-reported. The students should be made aware that the data collected will only be used in aggregate, other than the testimonials the student shares for marketing purposes.

Institution should identify appropriate staff for access to the COF Payment and Tracking System as a Data Reporter. In order to receive access, please complete the HEI Institution User Authorization form located on the ‘Resources’ tab of the COF Website (https://www.ohiohighered.org/cof/resources) and email the form to mjohnson@highered.ohio.gov.

Data Reporters:

- Have limited access (no manual entry capabilities); can download the template and upload the template into the system; can view student data and download reports and analytics; can manage log in and contact information, but cannot submit a request to add a new user.
- Need to be aware of the sensitive nature of the data being uploaded and handled through the COF Payment and Tracking system, as the system contains both limited and restricted data.
- Appropriate staff (examples): administrative assistants, backup staff, general financial aid staff, Research & Sponsored Programs staff
- Please contact the ODHE Financial Aid Program Manager for edits or changes to the data system that are beyond the Data Reporter capability.

Data Collection Payment Template

The data collection template collects all the demographic and academic records required of COF scholars each term. Complete instructions for uploading the data collection template can be found here: https://www.ohiohighered.org/cof/resources (Choose Ohio First Payment Submission Instructions). Several key elements are required:
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST GENERAL

1) **SSN is required**: eventually the Student ID column will be removed, but must remain for now. Submissions without the SSN will not be accepted. Fill in the SSN column and leave the Student ID column blank – DO NOT DELETE THE STUDENT ID COLUMN.

2) **GPA is required**. The GPA should be the ending GPA for the term you are uploading. Placeholder GPAs (e.g., 0.00) are not acceptable. The submission window opens at the end of the semester, so the GPA should be an accurate representation of the term. For institution that do not calculate GPAs, please list the “hidden GPA” as ODHE has a 3.0 GPA benchmark. If a scholar falls below a 3.0, please include a scholar support plan.

3) **Excessive use of “U” or “UK” (Unknown) for Gender or Race is not acceptable**. Whenever possible, try to capture this information from the application or other sources on institution.

Data for public institutions is made available through the Higher Education Information System (HEI). Ohio private and independent institutions must submit data as requested to continue offering Choose Ohio First Scholarships. Data requests will be similar to submissions made to the Integrated Postsecondary Education Data System (IPEDS), including STEMM enrollment, graduation rates, etc.

- The institution must submit the required data in the Choose Ohio First Scholarship Data and Reporting System no later than 67 days following the end of the term referenced in the data form. Any requests received after such time will not be reimbursed. ODHE will distribute funds within 60 days of receipt of complete and accurate student data form.
- Windows for payment submission open the day after the end of each term and remain open for approximately 67 days. Check the COF Payment System website for your institution’s current window. Once your window is closed, it will not be reopened and you will 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 program manager before your window closes.
- Any scholars continuing from previous awards or cohorts must be on the teach-out lists submitted to ODHE by June 1st and must be submitted with correct COF award number.
- Please be sure all student payment data (especially CIP code and degree level) are accurate and match HEI (for public institutions).

**STEM Majors & Approved CIP Codes**

Institutions may only submit for reimbursement students who are enrolled in CIP codes approved under the institution’s current MOU. Any student submitted for payment under a CIP code not in the institution’s MOU will not be provided payment.

**Ongoing Monitoring and Review**

Institution should adhere to their institutional monitoring plan, as outlined in their approved proposals/applications. Basic internal monitoring will include review of majors and other requirements of funded students, verification of submission prior to uploading to the reporting system, and a continuous improvement plan. Assessments must be used to inform continuous performance improvement of the Choose Ohio First Program. When possible, program assessment that compares Choose Ohio First scholar performance to non-COF students is encouraged. Results should be communicated regularly to scholars and others as necessary (e.g., faculty, advisors, institution leadership, etc.). Surveys administered to scholars may be used to measure program satisfaction and results should be communicated through the Annual Report. Choose Ohio First institution are subject to ongoing monitoring and review of the status of COF, including desk reviews and/or site visits conducted by the Director.
GUIDELINES AND PROCEDURES FOR CHOOSE OHIO FIRST GENERAL

Annual Reporting

An Annual Report on the status and progress of the Choose Ohio First program is due from each institution no later than August 10 of each funded program year, and for up to three additional years of monitoring if/when funding ends. The Annual Report online form and narrative templates may be found here: https://www.ohiohigher.edu/cof/resources. Annual Report submissions are integral to the compilation of the overall statewide report due to the state legislature in fall.

SCHOLAR SUPPORT

Student Support Services

The Choose Ohio First program provides awareness and access to academic services meant to positively impact student performance. When possible, these services should be available exclusively for COF scholars. Any service provided should align with the goals of the Choose Ohio First program, and serve as a means of increasing completion. The institution may provide or have access to student academic support services including but not limited to the following:

- Student advising related to the successful completion of degree program
- Academic support for students with disabilities and other learning needs
- Physical or mental health counseling and/or external referrals
- Environmental support on-site or through external referrals if applicable to the demographic makeup of COF scholar population (e.g., for transportation, child care, personal finance).
- Career counseling
- Tutoring and academic enrichment services
Links to Related Documents and Sites

**Ohio Revised Code**

Chapter 3333: Ohio Board of Regents [http://codes.ohio.gov/orc/3333](http://codes.ohio.gov/orc/3333)

Chapter 3333.60: Ohio innovation partnership definitions [http://codes.ohio.gov/orc/3333.60](http://codes.ohio.gov/orc/3333.60)

Chapter 3333.62: Competitive process for program awards [http://codes.ohio.gov/orc/3333.62](http://codes.ohio.gov/orc/3333.62)

Chapter 3333.69: Monitor of initiatives for which award granted [http://codes.ohio.gov/orc/3333.69](http://codes.ohio.gov/orc/3333.69)

**Ohio Administrative Code**

3333-1-10: Ohio student residency for state subsidy and tuition [http://codes.ohio.gov/oac/3333-1-10](http://codes.ohio.gov/oac/3333-1-10)

3333-1-61.2: Objectives to be reflected [http://codes.ohio.gov/oac/3333-1-61.2](http://codes.ohio.gov/oac/3333-1-61.2)

**Other Documents and Sites**

Ohio Revised Code Index for COF - [https://www.ohiohighered.org/cof/resources](https://www.ohiohighered.org/cof/resources)

Choose Ohio First programs and webpage – [www.chooseohiofirst.org](http://www.chooseohiofirst.org)


Site Visit/Desk Review Schedule & documents - [https://www.ohiohighered.org/node/313](https://www.ohiohighered.org/node/313)

Choose Ohio First Data upload site - [https://chooseohiofirst.ohiohighered.org](https://chooseohiofirst.ohiohighered.org)