

Scholarship Advisory Committee Report

Faculty Senate: 9 January 2006

Executive Committee: 19 December 2005

Submitted by Joyce Kinkead, Vice Provost for Undergraduate Studies and Research; Judy LeCheminant, Director of Financial Aid; Taya Flores, Scholarship Coordinator, Office of Financial Aid; Jennifer Putnam, Associate Director of Admissions; Melissa Miller Kincart, Office of the Provost

Summary

Beginning in 2001, Utah State University began a serious, concerted effort to focus on enrollment management, particularly at the undergraduate level. Significant efforts have been made to reach each of these.

Please note that almost all of the “scholarships” awarded are in fact “waivers,” based on legislated classifications. For undergraduates, there are 16 types of waivers, ranging from 10% waiver pool to athletics; from ISU-USU to 100 mile; from WICHE Western Undergraduate Exchange to National Guard. The accounting for undergraduate waivers and scholarships is overseen by Jennifer Putnam of Admissions and Taya Flores of Financial Aid.

For graduate students, 6 waiver accounts exist. In addition, there is an account for Graduate Assistant Remissions. At one time, offices that award waivers did so by number of awards; over the past two years, this has changed to a dollar figure, which is capped. Undergraduate waivers are capped at a maximum amount of \$7,907,800 while graduate waivers are at \$3,034,100 with an additional \$1,498,800 for remissions, resulting in an overall total of \$12,430,700. A waiver truly means that tuition is waived; there is no state funding to cover the waiver.

Awarding and tracking waiver-based scholarships by account source is an enormous task but capably overseen by Putnam and Flores. Keeping the waivers within budget is a priority.

Our yield—number of undergraduate students enrolled--has been declining since the move to dollar-based awards from full waivers. This move did, however, allow the university to offer more students some type of scholarship award. It also allowed the offices involved to predict budget commitments based on real dollar figures. Following is a table that shows the number of students who were awarded waiver-based scholarships and who enrolled over the past five years. Please note that as tuition increases, the amount spent will necessarily increase even as the number of students decrease.

Award Year	# Awarded	# Accepted	# Enrolled	Yield	Amount Spent
2001	1,364	921	697	51%	\$2,170,860
2002	1,634	1,066	699	42%	\$1,995,838
2003*	2,197	1,578	1,337	60%	\$3,418,031*
2004	1,989	1,355	1,153	57%	\$3,207,687
2005	2,180	1,307	1,063	48%	\$3,369,000**

*Dean's error

**As of 8/1/05

All National Level scholarships were figured according to HB 75 and 10% (NR-waive resident portion) budget, which is the only funding currently available for out-of-state scholarships (aside from the cash accounts).

Fall 2005 saw the second class of University Undergraduate Research Fellows enter, a total of 32 freshmen, selected through a faculty interview process held at Scholars Day in which Presidential Scholars competed. Fellows receive a \$1000 annual stipend, which is renewal. (The U Club Scholarship paid \$2400 annually as a stipend; the Fellowship replaces U Club.) The Fellowship program seems to be very successful; first-year students are engaging in research immediately, a few of them ready to present projects at the State Capitol in year one; students in year two are presenting at the National Conference on Undergraduate Research and are also publishing

research articles. Four of the sophomore Fellows were named Governor's Scholars. One purpose of the Fellowship program is to increase Utah State's number of students competing for and winning national and international fellowships; it is too early to tell if this will be the case. Fellowships are funded through the Vice President for Research Office.

The Alumni Office, working in cooperation with Admissions, restructured its scholarship program as Legacy Scholarships, which can be stacked on other university awards, and is funded through Alumni Chapters and affinity revenue-producing sources rather than through a match by the university.

Factors which contributed to an increase in awards and expenditures over the past few years include the following: the decision to move all freshmen scholarships to four-year awards (colleges cooperated in this by centralizing their waivers); lowering the parameters for all freshmen and transfer scholarships; regularizing the GPA requirement necessary to maintain the scholarships, which meant lowering one GPA requirement; the move from tuition waivers to cash amounts; and a concerted effort to competitively attract "good students" who were previously accepting awards from lower profile institutions.

Understanding the budget and different accounts of waivers has brought to light some new knowledge. For instance, International students do qualify for certain types of waivers, which has enabled the International Students and Scholars Office to petition the Provost's Office for additional scholarship assistance.

Issues:

- As the cost of tuition rises, the funding in the scholarship accounts is capped, which influences the numbers of awards that can be made. This is true in all "waiver" areas, including undergraduate, graduate, athletic, fine arts, and others.
- Some funding sources for awards are scheduled to diminish to free up discretionary funds for other university uses.
- With the coming of a Comprehensive Campaign, the development office is doing needed work to regularize donor accounts, report on them, and to provide effective stewardship.
- Utah State needs a much more robust endowed scholarship program.
- Representative Buttar's sponsored house bill aims to remove the sunset clause from HB75 and also grant USU an additional 400 out-of-state waivers.
- Posting awards on Banner has presented some challenges, but appropriate groups have been meeting to work out the details.