Scholarship Administrators Meeting
Virtual Meeting - April 8, 2021

Welcome

Update on CARES Funding/Emergency Grants – Michelle Curtis, Office of Student Finance
The following information was obtained at the Registrar’s Advisory committee (RAC) meeting on April 5, 2021

HEERF Update
Work continues on preparing to award the Block grants for undergraduate and graduate students, as well as the degree completion funds. The One Stop Website has been updated with additional information about these fund types. The emergency grant application form has significantly been reduced.

- Block Grants for undergraduates: Must be PELL eligible students. Planning for this week, $500 min to $1600 max will be given
- Block Grants for graduate students: Will be due the week of April 16.
  - Course 999 will not be eligible – must be credit bearing class. Following our current policy located at https://onestop.umn.edu/academics/special-registration-categories-graduate-and-professional-students. Any potential changes will be communicated.
- Emergency Grants, planning for next week. Requires a separate application, not available on the website, students must contact One Stop to obtain. Does not need to show “need” but must have a FAFSA on file.
- Degree Completion/student success funds – Still working out the final details. ASR is identifying these students
- Institutional Emergency Grants - being funded by the depts/college, awarded by OSF. Undergraduate funds have been exhausted. Graduate funds still available but very limited
- All CARES money is non-sticky, i.e. being directed to students, bypassing balances due on their student accounts. Students can then elect whether or not to pay any outstanding UM bills.
- This group of CARES funds does not need to be related to COVID
- We have through 2023 to spend the third round of HEERF money.
- HEERF Comparison Chart is attached.

Institutional Emergency Grant Update
- Continue to accept emergency grant applications for the spring 2021 term.
- Students can email onestop@umn.edu with a request for emergency funds and we will send the student an application.
- A large volume has been awarded this spring.
  - We have awarded 426 students with over $261,000 this spring term so far.
  - By comparison, the fall 2020 term was 147 grants for a total of $104,151
  - The range of the awards continues to be $100-$1,000 with the average award amount being $673.
- Since March 2020, we have awarded over $1 million in institutional emergency grants. Thank you to all of the colleges, units, and departments that participate in this initiative!
• Students should continue to be referred to One Stop Student Services if they express a need for financial assistance. An email to One Stop stating they have a need is sufficient to begin the process.
• We expect some additional funding for institutional emergency grants to be coming very soon from a source that involves some old Perkins funding.

Campus/Community Resources
Located at [https://onestop.umn.edu/student-emergency-funds](https://onestop.umn.edu/student-emergency-funds), there are campus and community resources for students (e.g., food shelves/pantries, low-income energy assistance program, affordable internet access).

Promise Plus – What We Know – Michelle Curtis
The Promise Plus scholarship program grants students whose families earn less than $120,000 annually a guaranteed, multi-year scholarship. This program begins in fall 2021. Eligible, incoming first-year students have received a communication from Admissions regarding their eligibility for Promise Plus. A copy of the communication is attached.

Dream Act students are also eligible. We have defined institutional funds for them. They do need to go through the Office of Higher Education (OHE) to complete the application, making them eligible. Dream Act students will be communicated with separately because of different considerations for that population.

Information about Promise Plus (including FAQ) is available on a system-wide site: [https://system.umn.edu/u-promise-and-promise-plus](https://system.umn.edu/u-promise-and-promise-plus).

Admissions Scholarship Update – Jenny Malek
• Confirmation deadline of May 1
• Expect freshman class to come in at targeted number
• Uptick in MN and reciprocity numbers
• Next steps – return to campus and full operations as defined by President
• Showcases and on campus tours, 45 states have attended in person
• Has been a lot of interaction with families, specifically regarding housing
• 11,000 scholarship packets have been mailed to admitted students
• Merit base scholarships have mostly all been offered by now, a few remain to be awarded if applicable
• No ACT or SAT tests will be required for Fall 2022 applicants
• Keri Zweig Risic will act as the new interim Director of Admissions for 2 years

Office of Student Finance Updates – Nate Rosckes, LuGail Hamel & Michelle Curtis
Packaging of Financial Aid Notices (FAN)
• Freshman packaging has been completed. Continues as FAFSA’s are received.
• Returning students expect to be packaged in early July.

Summer Scholarship Processing
• Summer 2021 scholarships can now be submitted via uploads
• Students must be registered before an upload will successfully process.
• If not registered, a code 608 will appear on your Status Upload Report. A comment will be placed on the report as well as an email sent to the administrator that completed the upload.
• If not initially registered, you need not submit a new file. As time permits, I monitor and reprocess the original record as students register. You can also follow-up by emailing saosf@umn.edu.

• Students will receive their summer funds if registered for one credit or more.
  o The only exception is Class 4999, which allows for a zero credit course, for off campus research.
  o Instructions for registering for this course are located at the bottom of the ASR website at https://www.asr.umn.edu/training-and-support/scholarship-administrators.
  o Students registered in only Course 4999 will not be eligible for either COVID or Emergency grants referenced above.

• Summer Aid will be applied to student accounts beginning May 31, with the first refund of proceeds, if applicable, issued on June 4.

• At the ASR website, you will find Important Dates for Scholarship Administrators for both the spring/AY terms as well as summer. Be sure to submit any remaining spring term scholarships by May 6 for processing. As the term and end of the AY close, scholarships need to be processed as stipulated.

Miscellaneous
• AU holds were placed on past due accounts beginning in February 2021. Students needing to register for fall 2021 but have a hold on their account should contact OneStop for assistance/resolution, enabling them to register.
• Emails were recently sent to approximately 300+ students with outstanding balances that haven’t applied for aid for AY2021
• Students who are not meeting Satisfactory Application Progress (SAP) must appeal their status before aid will be released. Emails have recently been sent to all students in this status for the spring term. It is too late to appeal fall term.
• We expect 85% of fall 2021 classes to be held in-person
• Sue Van Vorhis, Associate Vice Provost and University Registrar has resigned, leaving on June 7. She will be doing in person consulting.

Next Scholarship Administrators meeting is scheduled for June 7, 1-2 pm via zoom.
### Higher Education Emergency Relief Funds Comparison Chart

**March 2021**

Any updates to this chart made after the initial publication on March 15, 2021 will appear in red text.

<table>
<thead>
<tr>
<th>Item</th>
<th>HEERF I Funds (The Coronavirus Aid, Relief, and Economic Security Act (CARES Act))</th>
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<th>HEERF III Funds (The American Rescue Plan (ARP))</th>
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<td><strong>Total HEERF Funding Amount</strong></td>
<td>$14 billion</td>
<td>$23 billion</td>
<td>$40 billion</td>
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| **Required Student Spending** | ● 50% of an institution’s allotment must go to emergency financial aid grants to students | ● Requires institutions to spend the same dollar amount on student grants as they were required to spend under the CARES Act  
   ● For-profits must use 100% of their allotment on student grants | ● At least 50% of an institution’s total allotment must go to student grants  
   ● For-profits must use 100% of their allotment on student grants |
| **Allocation Formula** | ● 75% on the enrollment of full-time equivalent (FTE) Pell Grant recipients  
   ● 25% on enrollment of FTE non-Pell Grant recipients  
   ● Students who were enrolled exclusively in online, distance education courses prior to the COVID-19 emergency were excluded from this calculation | ● 37.5% on FTE enrollment of Pell Grant recipients who were not enrolled exclusively in distance education courses prior to the qualifying emergency  
   ● 37.5% on headcount enrollment of Pell recipients who were not enrolled exclusively in distance education courses prior to the qualifying emergency  
   ● 11.5% on FTE enrollment of non-Pell recipients who were not enrolled exclusively in distance education courses prior to the qualifying emergency  
   ● 11.5% on headcount enrollment of non-Pell recipients who were not enrolled exclusively in distance education courses prior to the qualifying emergency  
   ● 1% based on FTE enrollment of Pell recipients who were exclusively enrolled in distance education course prior to the qualifying emergency  
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| Funding Breakdown | ● $1 billion to minority-serving institutions  
● $350 million to help colleges most affected by the crisis | ● $1.7 billion to minority-serving institutions  
● $113.5 million for institutions with the greatest unmet need related to the pandemic through FIPSE  
● $681 million for for-profit institutions (funds must only be used on student grants - for-profit institutions were not eligible for (a)(1) pot of funds) | ● $36 billion for public and private non-profits  
● $3 billion for MSI  
● $198 million unmet need  
● $396 million for for-profit institutions (funds must only be used on student grants) |
| Requirement to Prioritize Need | ● Not required by law, but ED guidance encouraged institutions to prioritize students with the greatest need | ● Yes | ● Yes |
| Student Portion Allowable Uses | ● Funds must go directly to students in the form of emergency financial aid grants for expenses related to the disruption of campus operations due to coronavirus  
● Can be used for eligible COA expenses such as food, housing, course materials, technology, health care, and child care | ● Any component of student’s cost of attendance  
● Emergency costs that arise due to coronavirus, such as: tuition; food; housing; health care (including mental); childcare | ● Any component of student’s cost of attendance  
● Emergency costs that arise due to coronavirus, such as: tuition; food; housing; health care (including mental); childcare |
| Institutional Portion Allowable Uses | ● Defray expenses due to significant changes to the delivery of instruction due to the coronavirus  
● Make additional financial aid grants to students | ● Defray expenses associated with coronavirus including:  
○ Lost revenue  
○ Reimbursement for expenses already incurred  
○ Technology costs associated with a transition to distance Education  
○ Faculty and staff trainings  
○ Payroll  
● Carry out student support activities authorized by the HEA that address needs related to coronavirus  
● Make additional financial aid grants to students | ● Defray expenses associated with coronavirus including:  
○ Lost revenue  
○ Reimbursement for expenses already incurred  
○ Technology costs associated with a transition to distance education  
○ Faculty and staff trainings  
○ Payroll  
● Make additional financial aid grants to students |
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The Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA Act) | HEERF III Funds  
The American Rescue Plan (ARP) |
|------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|
| Institutional Portion Allowable Uses (continued) | • No student eligibility requirements in the law, but ED guidance was that students must meet Title IV eligibility requirements in order to receive HEERF emergency grants  
• DACA students, undocumented students and international students prohibited by ED guidance  
• Unspent HEERF I funds after December 27, 2020 may be awarded to non-degree seeking, non-credit, dual enrollment, and continuing education students eligible per ED guidance  
• Online students who were enrolled exclusively in online programs on March 13th are not eligible per the law | • No student eligibility requirements in the law  
• Non-degree seeking, non-credit, dual enrollment, and continuing education students eligible per ED guidance  
• Students exclusively enrolled in distance education may receive these funds  
• ED has not issued written guidance to clarify whether or not undocumented, DACA, or international students may receive these funds | • Institutions must use a portion of their allocation for:  
○ Implementing evidence-based practices to monitor and suppress coronavirus in accordance with public health guidelines; and  
○ Conduct direct outreach to financial aid applicants about the opportunity to receive a financial aid adjustment due to the recent unemployment of a family member or independent student, or other circumstances |
<p>| Student Eligibility | • None | | |
| Misc. | • None | • Institutions subject to the endowment excise tax had their allocations reduced by 50% and are required to spend those funds only on student emergency grants, or for sanitation, personal protective equipment (PPE), or other expenses associated with the general health and safety of the campus environment | • Institutions subject to the endowment excise tax would not be subject to restrictions on amount of allocations or uses of funds applicable to previous HEERF |</p>
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<td>Application Required to Receive Funds?</td>
<td>● Institutions must sign the Funding Certification and Agreement for Emergency Grants for both the student and institutional portions of funding</td>
<td>● Institutions who received funds under the CARES Act do not need to complete any application or forms to receive their allocation</td>
<td>● Specific requirements related to the application process for these funds have not been released yet</td>
</tr>
<tr>
<td>Reporting Requirements</td>
<td>● Institutions must report publicly on their primary websites on a quarterly basis for both student portion and institutional portion funds</td>
<td>● Specific requirements for reporting of these funds have not been released yet</td>
<td>● Specific requirements related to the reporting of these funds have not been released yet</td>
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<td></td>
<td>● Institutions are required to submit an annual report to the Department by February 8, 2021 covering CARES Act HEERF grant expenditures in calendar year 2020</td>
<td>● The CRRSA language around reporting reads: “Recipient must promptly and timely report to the Department on the use of funds no later than 6 months after the date of this award in a manner to be specified by the Secretary pursuant to section 314(e) of the CRRSAA. Recipient must also promptly and timely provide a detailed accounting of the use of funds provided by this award in such manner and with such subsequent frequency as the Secretary may require. Recipient acknowledges the Department may require additional or more frequent reporting to be specified by the Secretary.”</td>
<td></td>
</tr>
<tr>
<td>Deadline to Spend Funds</td>
<td>● All institutions have one calendar year from the date of award in their HEERF Grant Award Notification (GAN) to complete the performance of their HEERF grant</td>
<td>● An institution has one year from the date the school's supplemental grant was processed to distribute the HEERF II funds</td>
<td>● Specific requirements related to the spending deadline for these funds have not been released yet</td>
</tr>
<tr>
<td>Counted as EFA, taxable income, untaxed income?</td>
<td>● No</td>
<td>● No</td>
<td>● No</td>
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Dear <First Name>,

Good news! I am writing to share that our financial aid office has reviewed your Free Application for Federal Student Aid (FAFSA) and determined that you are eligible for full tuition coverage through the Promise Plus Free Tuition Program (Promise Plus).

Promise Plus is a tuition guarantee program which will cover your tuition for up to four years, as long as you keep meeting eligibility requirements. So, you can proceed to confirm your enrollment to attend the University of Minnesota Twin Cities with confidence that you’ll be supported to earn your degree and move forward with your career.

Please review the information below to better understand how this will be applied towards your tuition. You will still be responsible for costs beyond your tuition that are considered part of your cost of attendance. You can find more information about cost of attendance online.

We are committed to you, and hope you take advantage of this great opportunity!

How does a tuition guarantee program work?

1. **No separate application is needed.** Since you were admitted to the U of M and have completed the FAFSA, our financial aid team has reviewed your financial information.

2. **Estimated financial aid offer:** For this initial estimate, all of the federal, state, and University grants/scholarships funding you are eligible for are applied to see how much of your tuition is covered by those funds. Any tuition amount not covered by the other sources, is then covered by Promise Plus.
   - Promise Plus funding will cover any remaining balance of tuition not covered by your other grants/ scholarships. **Note:** Promise Plus does not cover other components of cost of attendance, like housing, books, fees.
   - **First Financial Aid Notice sent:** In late February and through early summer, the University generates an estimated financial aid notice for each newly admitted student who’s completed the FAFSA. The University will email you this initial estimate of your financial aid (you can also find the information in your MyU account) so you can make a decision about whether to attend the U of M by the May 1 confirmation deadline.

   **Why is this an initial estimate of financial aid?** Because you may still receive additional scholarships from other sources that need to be applied towards your tuition (which then reduces the need for the funding from Promise Plus). Also the
Regents of the University of Minnesota set the tuition rates in the summer for the upcoming academic year. We need that tuition information to calculate your official financial aid package.

3. **Official financial aid package offer:** When tuition is set in the summer of each year, you will receive your official financial aid notice that takes into account all of the scholarships you’ve received as well as any federal, state, and University grants.

Your amount of Promise Plus funding may be less in the official financial aid package, because other, newly received scholarships or funding will be included and your first financial aid package will be updated. Ultimately, you’ll have your tuition covered when eligible for Promise Plus.

**Notes:**

- **The goal of Promise Plus is to cover the tuition for eligible students** that is not covered by federal, state, and University scholarships, grants, waivers, and other funds. Other sources of funding will be used first before Promise Plus is applied, so that the funding can be stretched to assist other students with their costs.

- **Promise Plus does not cover other components of** cost of attendance outside of tuition, like housing, books, fees.

- **You must enroll and take at least 13 credits:** We encourage you to enroll in 15 credits to complete your degree in 4 years.

4. **Complete the annual FAFSA.** Each year you must complete the FAFSA in order to be considered for Promise Plus. If you continue to meet eligibility requirements, you will remain eligible for Promise Plus Free Tuition. > [Review our FAQs for more information on eligibility.](#)

**Frequently Asked Questions**

- **How does Promise Plus differ from a scholarship or grant?** The amount you need from Promise Plus will vary depending on the other sources of funding you are eligible for or are given. If your tuition is not already covered by other awards, then Promise Plus will flex to cover the remaining tuition charges, but can not go higher than the cost of tuition.

- **So why does it matter if I have this guarantee?** I don’t see Promise Plus on my Financial Aid Notice, is that an error?

  We apply other sources of funding (federal, state and institutional) towards your tuition first. If your tuition is able to be covered through those other mentioned sources, you
may not see Promise Plus in this year’s financial aid package. Or, you may see a small amount to make up the difference that other sources of funding do not cover. Note: Promise Plus does not cover other components of cost of attendance outside of tuition, like housing, books, fees.

It’s important to know you’re eligible though (and how to remain eligible each year) in case anything changes with your other awards. We want to make sure you understand this benefit so you can be confident and proceed with your education!

- **What are the eligibility requirements?** Find all of the Promise Plus details online!

I hope this has helped clarify how the Promise Plus Free Tuition Program supports you and your education. Please contact our One Stop staff who are happy to help with any further questions.

Email: xxxxxx
Phone: xxxxx

We look forward to welcoming you to the Gopher Community this fall as you begin your college journey.

Sincerely,

Heidi Meyer
Executive Director
Office Of Admission