



CHAPTER 5 – STUDENT FINANCIAL AID AND SCHOLARSHIPS

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5.1 OKLAHOMA COLLEGE ASSISTANCE PROGRAM

5.1.1 Purpose

The purpose of the Oklahoma College Assistance Program, an operating division of the Oklahoma State Regents for Higher Education (OSRHE) formerly known as the Oklahoma Guaranteed Student Loan Program, is to continue to service the guarantee of loans administered under the Federal Family Education Loan Program (FFELP) and provide support services for students, borrowers and others in areas including, but not limited to, college access, financial aid awareness, default prevention and financial literacy.

5.1.2 Authority

- A. Federal - The Oklahoma College Assistance Program, formerly known as the Oklahoma Guaranteed Student Loan Program, is authorized by Title IV, Part B of the Higher Education Act of 1965, (P.L. 89-329) as amended. It is administered by the U.S. Department of Education in accordance with Title 34 of the U.S. Code of Federal Regulations Part 682 and under the terms of the Agreements between the Secretary of Education and the OSRHE.
- B. State - Legislation creating the Oklahoma College Assistance Program, formerly known as the Oklahoma Guaranteed Student Loan Program, was enacted in 1965 through the Student Educational Assistance Fund. State Statutes governing the program are 70 O.S. §§ 622-624. Contractual powers of minors in regard to loans for higher education are specified in 15 O.S. Section 33.
- C. Other – The Oklahoma College Assistance Program, formerly known as the Oklahoma Guaranteed Student Loan Program, through its signed Cooperative Agreement for Guarantors Participating in the Common Manual, adopted the policies of the Common Manual Unified Student Loan Policy (Common Manual). The Common Manual provides a definitive source for all FFELP participants that contain, in one place, all statutory, regulatory, U.S. Department of Education guidance and guarantor policy information about the FFELP. The Common Manual is under continuous revision in order to reflect the numerous and complex federal regulations governing the FFELP.

Revised April 15, 1994, October 26, 2001, March 10, 2011 and XX XX, 2013.

5.1.3 Suspension or Non-Renewal of Professional and Commercial Driver Licenses

Administrative Rule Title 610 Chapter 25 Subchapter 25 (610:25-25)

A. Purpose (610:25-25-1)

The amendment of 70 O.S. 1991, § 623, by O.S.L. 1996, Ch. 261, § 1, necessitates the enactment of these rules procedures designed to provide those targeted by the amendment, namely the category of defaulted student loan borrowers that both fail to enter repayment, and also hold or otherwise qualify for a professional license or certification, with:

- a. An opportunity to establish repayment in lieu of loss of professional license or certification; and
- b. Notice, hearing requirements and appeal procedures, as authorized by the amendment.

B. Definitions (610:25-25-2)

The following words or terms, when used in this Subchapter, shall have the following meaning, unless the context clearly indicates otherwise:

“License” means any professional *license, certificate, registration, permit approval or similar document issued by a licensing board granting to an individual a right or privilege to engage in a profession, occupation or business, including Class A, B or C commercial driver licenses issued pursuant to Title 47 of the Oklahoma Statutes* [70 O.S., § 623.1 (E)(2)].

“Licensing board” means *any bureau, department, division, board, agency or commission of this state or of a municipality in this state that issues a license* [70 O.S., § 623.1 (E)(1)].

“Reasonable and affordable monthly payment” means a determination of payment amount made by the Oklahoma State Regents for Higher Education (OSRHE), pursuant to applicable federal regulations whereby assessment is made of licensee’s disposable income and necessary expenses based on documentation provided by licensee that supports a smaller payment than is generally required of borrowers under the federal Higher Education Act of 1965 as amended.

“Satisfactory repayment” is achieved when licensee has made six (6) consecutive, on-time, voluntary, reasonable and affordable payments directly to OSRHE, pursuant to a written repayment agreement approved by OSRHE. Voluntary payments do not include payments obtained by income tax off-set, garnishment, or income or asset execution. On-time means received by OSRHE within fifteen (15) days of the scheduled due date.

“Valid request for hearing” must be made within thirty (30) days of issuance of final notification, and shall explicitly state

the reason for such request. Further, the stated reason(s) for the request must indicate clear relevance to the issue of whether licensee is in or will enter into satisfactory repayment. No extraneous or unrelated claims or issues, such as those regarding the validity of the debt, the quality of the education received, false certification, etc., will be addressed in a hearing pursuant to this Subchapter. Borrowers with such claims must resort to already established administrative remedies in a separate proceeding or forum.

- C. **“Written repayment agreement”** must be written and clearly state the total amount owed, the interest rate, down-payment amount, monthly payment amount, due dates for both down payment and regular monthly payments, duration of agreement, and any other terms of consideration for the agreement.
Notification procedure (610:25-25-3)
1. Initial notification
 - a. Upon purchase of a default claim, Oklahoma State Regents for Higher Education (OSRHE) shall notify the defaulted borrower in writing that failure to pay satisfactorily, as defined by applicable federal regulation, may result in suspension or non-renewal of any professional *license, certificate, registration, permit approval or similar document issued by a licensing board granting to an individual a right or privilege to engage in a profession, occupation or business, including Class A, B or C commercial driver licenses issued pursuant to Title 47 of the Oklahoma Statutes* [70 O.S., § 623.1 (E)(2)].
 - b. If, after the initial notification, borrower fails to enter repayment or falls out of repayment, OSRHE shall continue collection efforts, informing the licensee in writing on a regular basis of the consequences of failing to repay, as prescribed by federal regulation, for a period of no less than sixty (60) days. Final notification may be issued by OSRHE only after it has attempted to collect the defaulted loan for sixty (60) days.
 2. Final notification
 - a. OSRHE shall provide a final notification letter allowing an additional thirty (30) days prior to notification of the licensing board. The final notification shall provide the defaulted student loan borrower with an administrative process to challenge issuance of notification of default to licensing board.

- b. The final notification shall be mailed to the licensee's last known address and shall describe the nature and amount of the debt, the intention of OSRHE to notify the appropriate licensing board and an explanation of the licensee's rights.
 - c. The final notification shall state that the licensee's professional license, certification, registration, permit approval or similar document issued by a licensing board granting to an individual a right or privilege to engage in a profession, occupation or business, including Class A, B or C commercial driver licenses, shall be suspended and/or not renewed by the licensing board thirty (30) days after OSRHE's mailing of the notice to licensee's last known address, unless within that time the licensee:
 - i. pays the balance due as stated in the notice,
 - ii. enters into a written repayment agreement approved by the OSRHE, or
 - iii. appears and shows cause in a hearing before a hearing official that suspension or non-renewal of a license is not appropriate.
 - d. For purposes of this Subsection, in absence of evidence to the contrary, a licensee shall be considered to have received the final notification, five (5) days after issuance by OSRHE.
- D. Written repayment agreement executed subsequent to final notice (610:25-25-4)
- 1. Any written repayment agreement referred to in this procedure shall clearly state the total amount owed, the interest rate, down-payment amount, monthly payment amount, due dates for both down payment and regular monthly payments, duration of agreement, and any other terms of consideration for the agreement (which terms may include requirement that licensee provide current employment and salary information, as well as tax information, and submit to semi-annual or annual reviews).
 - 2. Written repayment agreements executed subsequent to OSRHE's issuance of the final notice but prior to notification of the appropriate licensing board shall:
 - a. be signed by licensee or licensee's legally authorized representative, and

- b. become effective only upon OSRHE's receipt of licensee's down payment, which sum shall be equivalent to three (3) monthly payments and shall be paid to OSRHE in cash, money order or certified funds.
 - 3. Written repayment agreements executed subsequent to notification of any applicable licensing board or subsequent to suspension of any applicable license shall:
 - a. be signed by licensee or licensee's legally authorized representative, and
 - b. become effective only upon OSRHE's receipt of licensee's down payment, which sum shall be equivalent to six (6) monthly payments and shall be paid to OSRHE in cash, money order or certified funds.
 - 4. OSRHE may, at its discretion, agree to accept a down-payment amount less than the amount required under (b) or (c) of this Section after review of licensee's total documented financial circumstances.
- E. Repayment agreement default (610:25-25-5)
- 1. Where the licensee enters a written repayment agreement subsequent to OSRHE's final notification and commits to certain terms in consideration for OSRHE's agreement to forbear notification of licensing boards, the failure of the licensee to meet his/her obligations under the agreement, at any time, for the duration of the agreement, may result in immediate notification of default to licensing board without further notice to licensee.
 - 2. For purposes of this Section, the licensee shall be considered to have breached or failed to meet his/her obligations under the agreement upon becoming two (2) payments delinquent.
 - 3. OSRHE may, at its discretion, and under appropriate circumstances as prescribed by applicable federal regulation, temporarily suspend collection efforts including, but not limited to, notification of any licensing board.
- F. Hearing procedure (610:25-25-6)
- 1. To show cause why suspension or non-renewal of a license would not be appropriate, the licensee shall request a hearing from OSRHE. The request shall be made in writing and within thirty (30) days of OSRHE's issuance of the final notice and shall explicitly state the grounds or reason(s) for the request for hearing. For purposes of this paragraph, in absence of evidence to the

contrary, a licensee shall be considered to have received the final notice five (5) days after said notice was issued by OSRHE.

2. A valid request for hearing must be made within thirty (30) days of issuance of the final notice and shall explicitly state the reason(s) for such request. Further, the stated reason(s) for the request must indicate clear relevance to the issue of whether licensee is in or will enter into satisfactory repayment. No extraneous or unrelated claims or issues, such as those regarding the validity of the debt, the quality of the education received, false certification, etc., will be addressed in a hearing pursuant to this section. Borrowers with such claims must resort to already established administrative remedies in a separate proceeding or forum.
3. Upon receipt of a request for hearing, OSRHE shall evaluate whether the hearing request is valid. Invalid requests shall be summarily denied by OSRHE and returned to licensee with statement of denial.
4. If licensee submits a valid request for hearing, OSRHE may exercise discretion in attempting to resolve the matter to the mutual satisfaction of both parties prior to the involvement of an independent hearing official.
5. When licensee's valid request for hearing, as described in (b) of this Section, is received by OSRHE, OSRHE may not issue notification to the appropriate licensing board until licensee has been provided the requested hearing.
6. The time and location for the hearing with the independent hearing official shall be established by OSRHE. An oral hearing may, at the licensee's option, be conducted by telephone conference. OSRHE shall schedule all hearings with the hearing official and mail written notification of date and time of hearing to licensee allowing licensee at least ten (10) days' notice. Licensee shall bear any costs associated with travel to and from a hearing under this Section. Further, parties shall bear their own attorney fees.
7. Should a hearing with an independent hearing official be conducted, at the request of the licensee, the only issues that may be determined in such hearing are whether the licensee is in satisfactory repayment and/or whether licensee will enter into repayment. Possible determinations of the hearing official are, therefore, limited to the following:
 - a. Hearing official may determine that licensee is in satisfactory repayment and that OSRHE is

- prohibited from notifying licensing board of licensee's defaulted student loan so long as licensee maintains that status.
- b. Hearing official may determine that licensee will enter satisfactory repayment status and may issue a determination that licensee must sign a written repayment agreement.
 - i. Hearing official may specify terms for said agreement, but in no instance shall hearing official specify terms that may violate any federal or state law.
 - ii. Terms specified by the hearing official shall not extend statutory repayment period or create any impossibility of repayment in full within the applicable repayment period.
 - iii. So long as licensee complies with the terms, OSRHE is prohibited from notifying licensing board.
 - iv. Should licensee fail to meet his/her obligations under the agreement specified by the hearing official, OSRHE may proceed with notification of licensing board without further notice to licensee.
 - c. Hearing official may determine that licensee is not and will not enter satisfactory repayment status and that suspension or non-renewal of his/her license is appropriate and, accordingly, issue determination that OSRHE proceed with notification of licensing board.
8. A copy of hearing official's written determination shall be mailed to licensee on the day of issuance or at the earliest practicable date thereafter. Determinations of hearing official become final ten (10) days after issuance of written determination.
 9. Hearing official must, in all respects, strictly comply with all requirements of 34 C.F.R. § 682.
- G. Procedure for notification of licensing board to suspend and not renew (610:25-25-7)
1. If the licensee fails to respond to a final notice of intent to order the suspension or non-renewal of a license within the prescribed time, fails to timely request a hearing, or fails to appear at a regularly scheduled hearing, the licensee's defenses, objections, or request for a payment plan shall be considered without merit and

OSRHE may immediately proceed with notification of licensing board.

2. When OSRHE determines that the licensee is in default, as defined by applicable federal regulation, is not in satisfactory repayment, or has not entered into a written repayment agreement, and the thirty (30)-day final notification period has elapsed, or hearing official's determination that notification of licensing board should occur has become final, it may notify any licensing board that a licensee is in default on a student loan obligation.
 3. Pursuant to 70 O.S., § 623.1(B), upon receipt of the notice, the licensing boards shall suspend and not renew the license of the licensee until further notification by the OSRHE.
 4. Once so notified, no further administrative review or contested proceeding within the licensing board is required. No licensing board may be held liable for any suspension or nonrenewal of a license or commercial driver license pursuant to the provisions of this act [70 O.S., § 623.1 (C)].
- H. Procedure for appeal of hearing official's decision (610:25-25-8)
1. Upon written request by the licensee, the decision of the hearing official may be appealed to OSRHE. Licensee's written request for appeal must be received by OSRHE on or before the day that the determination of the hearing official becomes final (ten [10] days after issuance of written decision).
 - a. An appeal shall be reviewed by an OSRHE employee(s) whose employment responsibilities do not include the collection of defaulted student loans.
 - b. If licensee establishes to the satisfaction of OSRHE with verifiable and documented evidence that suspension, non-issuance or non-renewal of a license would create a significant hardship to the licensee, to the licensee's employees, to legal dependents residing in the licensee's household, or the persons, businesses, or other entities served by the licensee, OSRHE may provide one additional opportunity for the licensee to establish a satisfactory written repayment agreement.
 - c. OSRHE may grant a new hearing if reconsideration is warranted based on verifiable and documented evidence of material,

procedural irregularity.

- d. After review of all pertinent documentation, OSRHE shall issue a final written determination regarding appeal of hearing official's decision at the earliest practicable date but not later than thirty (30) days after OSRHE's receipt of appeal request.
 - i. Subject review may, but need not, include direct oral communication with licensee.
 - ii. Under circumstance where OSRHE upholds decision to proceed with notification of licensing board, OSRHE shall mail copy of its written determination to licensee and may not proceed to notification of licensing board until ten (10) days after copy of written determination is mailed to licensee.
 - e. The determinations of OSRHE, pursuant to this Section, are final agency decisions.
- 2. Nothing in this Section shall be construed to prevent post-suspension reconsideration, rehearing or reopening, at the discretion of OSRHE, for good cause shown by licensee.
 - 3. Under appropriate circumstances, as prescribed by federal regulation, OSRHE may temporarily suspend all collection efforts, including but not limited to, notification of licensing board.
 - 4. Employees of OSRHE must, in all respects, strictly comply with all requirements of 34 C.F.R. § 682, and all other federal and state laws.
- I. Procedure for notification of licensing board to renew or terminate suspension (610:25-25-9)
 - 1. OSRHE shall notify each licensing board, as soon as possible and no later than ten (10) business days, to renew or terminate suspension of license, when OSRHE determines:
 - a. that the licensee is no longer in default status due to repayment in full, loan rehabilitation or some other action that discharges the licensee of responsibility for repayment; or
 - b. when the licensee achieves satisfactory repayment status, which, pursuant to federal regulation, is defined as:

- i. licensee has made six (6) consecutive, on-time, voluntary, reasonable and affordable payments directly to OSRHE pursuant to a written repayment agreement approved by OSRHE;
 - ii. the required monthly amount may not be more than is reasonable and affordable based on the borrower's total, documented, financial circumstances;
 - iii. voluntary payments do not include payments obtained by income tax offset, garnishment, or income or asset execution;
 - iv. on-time means received by OSRHE within fifteen (15) days of the scheduled due date; or
 - c. when licensee executes a written repayment agreement and, in compliance with the requirements for a written repayment agreement executed subsequent to notification of licensing board as provided in this Section, remits a down payment equivalent to six (6) monthly payments.
- 2. *The issuing licensing board shall reinstate or renew the license of the licensee within thirty (30) days contingent upon the requirements of the licensing board [70 O.S., § 623.1 (D)].*

Emergency rule effective October 15, 1996, Permanent Rule effective May, 12, 1997

5.2 UNIVERSITY AND COLLEGE SUPPORTER SCHOLARSHIP

5.2.1 Purpose

University and College Supporter Scholarships shall be awarded to full-time students at a public institution of higher education who have demonstrated high academic achievement. The scholarship may be issued to cover costs of fees, books, materials, and services provided by the institution, including room and board.

5.2.2 General Provisions

- A. The number and amount of scholarship may be determined by the institutions to the extent that monies are available.
- B. The program will be funded through revenue collected from university or college supporter license plates.
- C. Institutions will distribute scholarship monies to recipients.
- D. Each institution shall submit to the State Regents for approval an accounting of the basis and amount of scholarship awards.
- E. Each institution shall submit to the State Regents an annual report of scholarship recipients and the amount of the scholarships awarded.
- F. Recipients of the Oklahoma State Regents Academic Scholars awards shall not be eligible for the University and College Scholarship Program.

Adopted October 4, 1991. Amended February 18, 2000

5.3 REGIONAL UNIVERSITY BACCALAUREATE SCHOLARSHIP PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 33 (610:25-33)

5.3.1 Purpose (610:25-33-1)

The purpose of the Regional University Baccalaureate Scholarship Program is:

- A. To enable public regional universities to provide up to four years of scholarship support to academically promising Oklahoma students enrolled in a baccalaureate program.
- B. To enhance academic quality in public regional universities.

5.3.2 Definitions (610:25-33-2)

The following words or terms, when used in this Subchapter, shall have the following meaning, unless the concept clearly indicates otherwise:

"Public Regional Institution" as defined by the State Regents' policy in Section II-2-24 under Regional and Special Purpose universities.

5.3.3 General Provisions (610:25-33-3)

- A. Each regional university will receive an annual allocation to support scholarships to be awarded to students who meet the eligibility criteria in 610:25-33-4, and continuing students who meet the criteria in 610:25-33-5. The university may establish additional eligibility criteria. The scholarship award may be used only at the university making the award; it is not portable.
- B. Funding for the awards shall be made in a special allocation of state appropriated monies to the regional universities. The regional universities shall make tuition waiver scholarships available to each student, as provided in State Regents' policy (IV.A.2.g). The allocation, tuition waiver, and any other state or federal financial aid for which the student qualifies shall comprise a scholarship amount not to exceed the costs of tuition and fees, room and board, and books and supplies required for courses.

5.3.4 Eligibility Requirements (610:25-33-4)

- A. Applicants shall be Oklahoma residents.
- B. Applicants must meet one of the following criteria defined below:
 - 1. An ACT qualified student, which shall mean a student whose American College Testing composite score is at least 30 and whose grade

point average and class rank are exceptional, as determined by the institution;

2. A National Merit Semifinalist or Commended Student, which shall mean a student designated as a National Merit Semifinalist or National Merit Commended Student by the National Merit Scholarship Corporation;
- C. Only ACT and SAT test scores from tests administered on national test dates will be considered for admission to the program.

5.3.5 Criteria for Continued Eligibility (610:25-33-5)

- A. Participants awarded a scholarship must maintain a cumulative 3.25 grade-point-average. A program year is defined as beginning in the fall semester and continuing through the summer term. The cumulative grade-point-average will be determined at the end of the program year, i.e., between the summer and fall terms.
- B. Scholarship recipients must maintain full-time enrollment each semester. Full-time enrollment shall mean a minimum of 12 hours per semester and 24 hours in the two regular semesters. Students who, due to extraordinary circumstances during the semester, drop below the minimum of 12 hours of initial enrollment, must earn 24 credit hours for the two regular semesters to retain eligibility for the next program year.
- C. A student who fails to meet the continued eligibility requirements will be removed from the program without academic scholarship assistance the following semester. Any semester during which the student does not receive an award due to failure to meet the continuing eligibility requirements is counted as a semester used in the program and is deducted from the eight semesters allotted for the program. A student may be reinstated to the program:
1. If the student achieves a 3.25 cumulative grade-point average at the end of the following fall or spring semester or summer term;
 2. If the student in the following fall or spring semester remedies the credit-hour deficiency by earning twelve credit hours in addition to the number of hours by which the student is deficient; or if the student earns the deficient credits in the following summer term.
- D. In summary, a student may be reinstated only one time and has one year to remedy the grade-point average or credit-hour deficiency. Maintaining eligibility and

familiarity with State Regents' and institutional policy is the responsibility of the student.

- E. Participants may take a leave of absence from the program by petition to the Oklahoma State Regents for Higher Education. Leaves of absence may not be used to remedy grade-point average or credit-hour deficiency.

5.3.6 Fiscal Policies (610:35-33-6)

- A. Students may be awarded additional state-supported financial aid, such as fee waiver scholarships and Oklahoma Tuition Aid Grants, but not in excess of the student's cost of attendance as determined by the institution consistent with regulations for federal financial aid.
- B. Students may accept scholarships and grants from non-state sources.
- C. A student may be awarded a scholarship for up to 8 semesters of study in a baccalaureate program at a regional university or until the student is granted a baccalaureate degree, whichever occurs first.
- D. The allocation of appropriated funds to the regional university shall be on the student's behalf and shall contain appropriate restrictions and conditions that such monies be expended only for the purposes authorized.
- E. Subject to approval by the Chancellor and contingent upon sufficient program funding, if a student fails to meet the requirements for continued eligibility, the university may award the remainder of the student's scholarship to another qualified student.
- F. Unused scholarship awards may be reallocated by the Chancellor to other universities. The reallocation of the unused scholarship funds shall be on the basis of the number of qualified students.

Approved by the State Regents April 15, 1994. Amended September 6, 1996, January 29, 1999, February 18, 2000, and May 27, 2010. Promulgated as administrative rule effective May 27, 2004, last amended effective May 27, 2010.

5.4 ACADEMIC SCHOLARS PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 1 (610:25-1)

5.4.1 Purpose (610:25-1-1)

- A. The Oklahoma State Regents Academic Scholars Program was created and funded by the Oklahoma Legislature and is administered by the Oklahoma State Regents as an incentive for students of high academic ability to attend both public and private higher education institutions in Oklahoma. The specific goals are:
 - 1. To retain top-ranked students from Oklahoma in Oklahoma colleges and enable these institutions to compete aggressively for top Oklahoma scholars;
 - 2. To attract high caliber out-of-state students to attend Oklahoma colleges and universities; and
 - 3. To enhance the academic quality in Oklahoma colleges and universities.

5.4.2 Definitions [REVOKED] (610:25-1-2)

5.4.3 General principles for operation of program (610:25-1-3)

- A. Recipients of award must attend a regionally or State Regents' accredited public, independent or proprietary higher education institution in Oklahoma.
- B. The program is designed to adhere to the State Regents' Policy on Social Justice by encouraging all potential applicants to the Oklahoma State Regents' Academic Scholars Program to enter national scholarship competition.
- C. Concurrently enrolled high school students are not eligible for this program.
- D. Only SAT and ACT test scores from tests administered on national test dates prior to college entry, excluding concurrently enrolled students and students enrolled for the summer term following high school graduation, will be considered for admission to the program. Qualifying test scores obtained on a national test date after college enrollment are invalid for applying to the program. Partial scores from more than one examination will not be considered.
- E. A student must enter the program the fall semester immediately after his/her class graduates from high school, except for students admitted under the State Regents' Opportunity Admission Category. The Chancellor may approve exceptions to this requirement for extraordinary circumstances.
- F. Disability Provision. Provisions contained in this section are consistent with 70 O.S. 1991, Section 2403, as amended, and federal legislation affecting disabled persons. If a person identifies himself or herself as a student with a disability and

requests consideration for a scholarship under the Academic Scholars Program by means other than standard testing procedures, the State Regents shall permit the student to be examined under the special testing arrangements provided by either ACT or The College Board provided that he or she meets the qualifications specified by ACT and SAT respectively to be examined. Performance percentile requirements for participation in the Academic Scholars Program remain the same as for other students. Students taking such tests and receiving Academic Scholarship awards will be expected to meet the same retention standards as other students. Special provisions may be considered in determining full-time enrollment for students falling in this category.

5.4.4 Eligibility Requirements and Term of Scholarship Award. (610:25-1-4)

- A. There are five avenues by which to qualify for the Academic Scholars Program. Each is defined below:
1. An Individual Applicant Qualified Student, which shall mean a student who is a resident of the State of Oklahoma whose ACT test score or whose Scholastic Aptitude Test score falls within the 99.5 to 100.0 percentile levels as administered in the State of Oklahoma and whose grade-point average and/or class rank is exceptional, as determined by the State Regents,
 2. A Presidential Scholar, which shall mean a student selected by the Commission on Presidential Scholars pursuant to the Presidential Scholars Program administered by the United States Department of Education,
 3. A National Merit Scholar, which shall mean a student designated as a National Merit Scholar by the National Merit Scholarship Corporation,
 4. A National Merit Finalist, which shall mean a student designated as a National Merit Finalist by the National Merit Scholarship Corporation.
 5. An Institutional Nominee, which shall mean a student nominated by an institution in The Oklahoma State System of Higher Education whose ACT test score or whose Scholastic Aptitude Test score falls within the 95.0 to 99.49 percentile levels, or who shows exceptional academic achievement as evidenced by factors including but not limited to grade point average, class rank, national awards, scholastic achievements, honors, and who shows exceptional promise based on documentation that may include but not be limited to teacher recommendations, extracurricular activities, and evidence of overcoming economic and social obstacles as determined by the State Regents. The State Regents

shall ensure that standards of high academic ability are documented. Scholarship awards to institutional nominees become effective when appropriate documentation is verified by the State Regents.

- a. Effective with the Fall 2006 semester, Institutional Nominees are required to meet at least one of the two minimum criteria outlined below to be considered eligible for application as an Institutional Nominee:
 - i. Research universities:
 - ACT: 32 or SAT equivalent
 - GPA 3.9 and either Top 2% Class Rank or rank of first or second in their graduating class
 - ii. Regional universities:
 - ACT: 30 or SAT equivalent
 - GPA 3.8 and either Top 4% Class Rank or rank of first or second in their graduating class
 - iii. Two-year colleges:
 - ACT: 29 or SAT equivalent
 - GPA 3.7 and either Top 5% Class Rank or rank of first or second in their graduating class
- b. Students graduating from high schools that do not provide class rank and home-educated students shall be considered for eligibility as an Institutional nominee based on their ACT or SAT test scores.
- c. Students are eligible for consideration as an Institutional Nominee no later than the fall semester immediately following the graduation of their high school class. The Chancellor may approve exceptions to this requirement for extraordinary circumstances.
- d. Institutional Nominees may be Oklahoma residents or nonresidents.
- e. Students receiving the scholarship as an Institutional Nominee of a two-year college are eligible for transfer to a four-year public or private Oklahoma institution after completion of an associate's degree or at least 48 credit hours within their first two academic years at any combination of two-year colleges in the State

System. In addition, the Institutional Nominee of a two-year college must attend the nominating institution for the first year.

- f. Students receiving the scholarship as an Institutional Nominee of a four-year university are eligible for transfer to another Oklahoma institution after one year of attendance at the nominating institution.
- g. Students who fail to enroll the first semester upon nomination forfeit their scholarship eligibility.
- h. Institutions may not replace students who forfeit their scholarship or are removed from the program due to failure to meet continuing eligibility requirements with another nominee.

- B. Students receiving the scholarship are eligible for eight semesters of scholarship at Oklahoma colleges and universities. Additional semesters of award, up to ten semesters, are available upon approval by the President or appropriate academic officer of the institution and the Chancellor. Additional semesters are intended only for extraordinary circumstances or for undergraduate academic programs that cannot be completed within eight semesters.

5.4.5 Criteria for Annual Renewal (610:25-1-5)

- A. Participants awarded a scholarship under the Academic Scholars Program shall maintain a 3.25 cumulative or retention grade-point average. The cumulative grade point average will include all courses attempted in high school for college credit. For the purpose of this policy, a fiscal year begins in the fall semester and continues through the summer term. The cumulative grade-point average will be determined between the summer and fall term.
- B. Participants awarded a scholarship under the Academic Scholars Program must enroll full-time each semester (as defined by the State Regents) for continuation in the program. In this context, “full-time” means a minimum of 12 hours per semester. A total of 24 hours must be earned for the program year to retain eligibility for the next program year. Students who, due to extraordinary circumstances during the semester, drop below the minimum of 12 hours of initial enrollment, must earn 24 credit hours for the program year to retain eligibility for the next program year. Students will not be eligible for summer support if they have not earned 24 semester credit hours in the preceding two regular semesters. Students who receive support for the summer semester must earn six hours of credit in order to be eligible for support in the fall semester. The six hours of enrollment required for summer support may consist of a

combination of summer and intersession enrollment. Awards made for the summer term will count as one-half of a semester used in the program and will be in the amount of one-half of a semester award.

- C. In order to receive a payment for enrollment in a summer term, the student must submit the summer term application to the State Regents' office by the specified deadline.
- D. Credit by examination, the practice of granting students credit for passing tests based on the subject matter of college courses in which they have not enrolled, audited courses and correspondence courses will not be considered toward meeting the full-time enrollment requirement or the requirement to earn 24 hours for the program year.
- E. A student beginning in the program for the first time in the summer must have achieved a 3.25 cumulative grade-point average at the end of the one year and the summer. The student is not required to meet the 3.25 grade-point average at the end of the first summer.

5.4.6 Reinstatement; leave of absence (610:25-1-6)

- A. A student who fails to meet the continued eligibility requirements will be removed from the program without academic scholarship assistance. A student may be reinstated to the program:
 - 1. If the student achieves a 3.25 cumulative grade-point average at the end of the following fall or spring semester or summer term; or
 - 2. If the student in the following fall or spring semester remedies the credit-hour deficiency by earning 12 credit hours in addition to the number of hours by which the student is deficient; or if the student earns the deficient credits in the following summer term.
 - 3. If the student is deficient in the number of credit hours earned for the academic year due to a grade of Incomplete, the student will be eligible for the following fall award if the Incomplete is remedied by a deadline determined by the State Regents.
- B. A student who is removed from the program may petition to the State Regents for reinstatement into the program. Reinstatement will only occur when the circumstance is covered in this policy or under unusual and compelling circumstances as determined by the State Regents. Scholarship assistance will not be awarded to students who fail to meet continuing eligibility requirements. Any semesters during which the student receives no award due to grade-point average or credit hour deficiency will be subtracted from the available semesters on the program.

Likewise, any period of enrollment, except intersession and summer terms, for which the student does not accept a scholarship award will be subtracted from the available semesters in the program.

- C. A student may be reinstated only one time and has one year to remedy the grade-point- average or credit-hour deficiency. Maintaining eligibility and familiarity with State Regents' and institutional policy is the responsibility of the student.
- D. Participants may take a leave of absence from the program for a period of time during which the student is not enrolled, unless the student is studying abroad. Participants may either take a leave of absence or request scholarship assistance for study abroad. Program recipients who elect to study abroad with scholarship assistance are required to meet all enrollment and grade point average requirements as specified in this policy for students attending Oklahoma colleges and universities. Leaves of absence may not be used to remedy grade-point-average or credit hour deficiency.

5.4.7 Fiscal aspects of program (610:25-1-7)

- A. Award limits. Academic Scholarship awards to qualified nonresident students attending Oklahoma institutions shall not exceed 25 percent of the greater of the number of awards of the preceding year or the amount of the previous year's funding for certified awards for the program.
- B. Additional aid. Students receiving this scholarship may also receive additional state-supported financial aid, but not in excess of the student's cost of attendance as determined by the institution consistent with regulations for federal financial aid. Likewise, a student may enhance the Academic Scholars award by accepting grants and scholarships from private sources.
- C. Funding priorities. The Oklahoma State Regents will, as soon as fiscally feasible, set aside in the Oklahoma State Regents' Academic Trust funds for the full scholarship commitment. Funding priority will be given first to prior years' recipients, and secondly, to any students applying for the scholarship for the first-time. For first-time students, priority will be given to Individual Applicant Qualified Students, Presidential Scholars, National Merit Scholars, and National Merit Finalists, and secondly, to Institutional Nominees.
- D. Amount of Scholarship. The program shall provide participants a scholarship in an amount not to exceed the average costs of tuition and other fees, room and board, and required textbooks or materials for undergraduate and graduate study for students attending regionally accredited public institutions of higher education in Oklahoma.
 - 1. The institution shall provide the student a tuition waiver that, when combined with the scholarship award, will

meet the costs described in paragraph (d) above.

2. Students who do not meet the continuing eligibility requirements for the scholarship may be eligible for the tuition waiver if they meet the standard tuition waiver criteria determined by the institution.
 3. Transfer students are eligible for the same level of tuition waiver as all other Academic Scholars.
 4. Institutions may elect to award nonresident students a resident and/or nonresident tuition waiver.
- E. Payment of funds. Funds made available to students as part of the Oklahoma State Regents Academic Scholars Program shall be paid directly to the institution in which the student is enrolled, in trust for the student, and on the student's behalf and shall contain appropriate restrictions and conditions that such monies are expended only for the purposes authorized by the State Statute authorizing this program.
- F. Private institutions. For students attending private Oklahoma institutions, the award amount will be the same as the student attending a similar type of public institution as defined by the State Regents.

5.4.8 Requirements for graduate and professional study (610:25-1-8)

- A. The requirements for graduate and professional-study participants in the Academic Scholars Program are as follows:
1. Eligible participants moving from undergraduate to graduate or professional schools shall have achieved a cumulative grade-point average of 3.25 and earned at least 24 credit hours, unless provided for in paragraph five of this section, during the preceding year of undergraduate school enrollment.
 2. Post-baccalaureate students must be enrolled in a degree program at graduate/professional schools and are required to meet the academic standards in effect at the graduate or professional school.
 3. The dean of the graduate college/professional school or his/her designee will certify to the State Regents' office that the student is enrolled full time and making satisfactory progress at the outset of each academic year as defined in 610:25-1-6(a)
 4. The number of awards a graduate/professional student may receive while doing graduate/professional study shall be determined by the unused portion of the award entitlement. A student may take no more than a one-year leave of absence between completion of undergraduate work and enrollment in a graduate or professional program.

5. Students who require less than 12 credit hours for graduation purposes during the last semester of undergraduate enrollment may request payment of their scholarship in the amount of ½ semester award for at least six hours of enrollment. The term will count as ½ semester used in the program.

Revised May 29, 1992; October 15, 1999, February 7, 2002 and revised on June 27, 2002. Permanent Rules effective July 9, 1992, last amended effective June 11, 2006.

5.5 CHANCELLOR HANS BRISCH SCHOLARSHIP PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 3 (610:25-3)

5.5.1 Purpose (610:25-3-1)

The purpose of the Chancellor Hans Brisch Scholarship Program is to strengthen the academic quality of Oklahoma higher education by attracting top scholars to Oklahoma campuses.

5.5.2 Criteria for selection of recipients (610:25-3-2)

- A. A Chancellor Hans Brisch Scholar shall be an entering freshman in college who meets the following criteria:
 - 1. high academic achievement in high school,
 - 2. outstanding leadership characteristics, and
 - 3. a commitment to the enhancement of the community as evidenced by his or her involvement in the initiation of a program or project in his/her school or community which resulted in an improvement of the learning environment of the school or the social betterment of the community.
- B. While the controlling criteria for this award shall be as stated in (a) of this Section, the program will include students with a diversity of geographic, ethnic and economic background and who plan to pursue a variety of programs of study in institutions across the state.

5.5.3 General principles for operation of program (610:25-3-3)

The Chancellor Hans Brisch Scholarship Program will operate under the following general principles:

- 1. Only students attending Oklahoma public institutions of higher education are eligible.
- 2. The program will be funded through accrued interest on private donations.
- 3. The funds will be held within the State Regents' Trust for Academic Scholars.
- 4. The scholarship program will not start until sufficient accrued interest has accumulated.

Adopted March 25, 1990, amended March 2006. Permanent Rule amended effective July 14, 2006

5.6 WILLIAM P. WILLIS SCHOLARSHIP PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 5 (610:25-5)

5.6.1 Purpose (610:25-5-1)

The 1986 Oklahoma Legislature authorized the Oklahoma State Regents for Higher education to establish and maintain the William P. Willis Scholarship Program ". . . for the purpose of providing scholarships to low-income, full-time undergraduates attending institutions in The Oklahoma State System of Higher Education." [70 O.S., § 2292]

5.6.2 Eligibility (610:25-5-2)

- A. Individuals who are residents of the State of Oklahoma shall be eligible to apply for assistance under the William P. Willis Scholarship Program.
- B. Individuals who are enrolled full time in an undergraduate program at a member institution of The Oklahoma State System of Higher Education shall be eligible for assistance under the program.
- C. Individuals who meet low-income criteria as established by the Oklahoma State Regents for Higher Education shall be eligible for admission to the program.
- D. Certification of applicant eligibility must be provided by a participating institution.

5.6.3 Nomination and selection of recipients (610:25-5-3)

Presidents of Oklahoma State System institutions of higher education will be invited to submit a William P. Willis Scholarship nominee and an alternate candidate for consideration of award prior to the beginning of the academic year. An advisory committee appointed by the Oklahoma State Regents for Higher Education will review the application and make the announcement of awards.

5.6.4 Maximum limitations (610:25-5-4)

William P. Willis Scholarships will be awarded on a yearly basis, renewable for up to three (3) additional years, in an amount equivalent to the average costs by sector of all general enrollment fees, books, materials and institutional services (including room and board) or, if sufficient monies are not available, a proportional amount thereof.

5.6.5 Study load requirements (610:25-5-5)

Students participating in the William P. Willis Scholarship Program must be enrolled as full-time students at one of Oklahoma's public colleges or universities and must maintain satisfactory progress toward the completion of their baccalaureate degree program as certified by institutional officials in order to continue their eligibility.

5.6.6 Scholarship apportionments (610:25-5-6)

No more than one William P. Willis Scholarship recipient shall attend each institution in The Oklahoma State System of Higher Education;

provided that one recipient, apart from the others, majoring in the field of history, shall attend Northeastern State University.

5.6.7 Certification of compliance (610:25-5-6)

Certification that William P. Willis Scholarship recipients have met the study load requirements must be received by the Oklahoma State Regents for Higher Education prior to the issuance of each payment. The program certification forms will be furnished to the scholarship recipients by the Oklahoma State Regents for Higher Education. It will be the individual recipient's responsibility to ensure that the forms are signed by the proper institutional official and returned to the Oklahoma State Regents for Higher Education no later than the third week of September and January for payments for the fall and spring semesters, respectively.

Adopted July 30, 1986. Revised September 24, 1990.

5.7 HEARTLAND SCHOLARSHIP PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 21 (610:25-21)

5.7.1 Purpose (610:25-21-1)

The Heartland Scholarship Program was established on April 28, 1995, by the Oklahoma State Regents for Higher Education in the aftermath of the April 19, 1995, bombing of the Alfred P. Murrah Federal Building in downtown Oklahoma City. The bombing took the lives of 168 individuals and injured more than 400. Many young children perished in the Federal Building day care center. For the children in the Federal Building day care center who survived and for dependent children of individuals killed as a result of the April 19, 1995, bombing, the Heartland Scholarship Program was established. The program consists of two funds:

1. The Heart of the Heartland Fund which is funded from state revenues generated from sales of the Heart of the Heartland license tags and
2. The Heartland Fund which is funded from private, corporate, civic, religious and other governmental agency donations.

5.7.2 Definitions (610:25-21-2)

The following words or terms, when used in this Subchapter, shall have the following meaning, unless the concept clearly indicates otherwise:

“**Accredited Institution**” means any college or university having regional accreditation.

“**Dependent Child**” includes any son, daughter, stepchild, or adopted child, who as of April 19, 1995, could lawfully be claimed as a dependency exemption for federal income tax purposes by his/her parents or guardian, or who could have been so claimed but for the fact that the parent killed in the Murrah Building bombing was prohibited from claiming that exemption by a court-ordered divorce decree or separation agreement. The term “dependent child” also includes any child conceived but not yet born as of April 19, 1995.

“**Full-time Student**” means an enrolled student who is carrying a full-time academic workload, other than by correspondence, as determined by the institution under a standard applicable to all students enrolled in a particular educational program measured in terms of

- A. course work or other required activities including any combination of courses, work experience, research or special studies which the institution requires of the student to consider him or her as being engaged in full-time study, and which amounts to the equivalent of a minimum of 12 undergraduate credit hours or nine graduate credit hours per academic semester, trimester, or quarter and
- B. the enrollment fees customarily charged for full-time study by the institution.

5.7.3 Eligibility requirements (610:25-21-3)

- A. General eligibility requirements. Individuals eligible for the Scholarships must be
 - 1. dependent children of individuals killed as a result of the April 19, 1995, bombing of the Alfred P. Murrah Federal Building, or
 - 2. surviving dependent children who were injured in the Federal Building day care center.
- B. Separate fund accounts. Separate fund accounts will be established within the Heartland Scholarship Program to provide separate receipt, accounting, administration, and disbursement of funds for:
 - 1. Heartland Scholarship.
 - a. Recipients must be enrolled full-time in an undergraduate program at any accredited college or university. Recipients may petition the State Regents for an exception to the full-time requirement for just cause shown.
 - b. Scholarship awards will be made for a time period not to exceed five continuous years. Recipients may petition the State Regents for an exception due to extenuating circumstances.
 - c. Scholarships may be for a specified group of bombing victim dependents so long as the designated group is not described or defined in a way that would jeopardize the tax deductibility of contributions to the Fund and/or to the recipients of scholarship awards by the beneficiaries. To the maximum degree possible, the Trustees will consult with donors to ascertain ways and means by which their designation objectives can be reconciled with the Fund's goals pertaining to tax deductibility.
 - 2. Heart of the Heartland Scholarship.
 - a. Recipients may attend only a state higher education institution in Oklahoma.
 - b. Recipients must be enrolled full-time in an undergraduate or graduate program.

5.7.4 Principles for awards, continuation of awards, disbursements, refunds, and applications (610:25-21-4)

- A. Award amounts.
 - 1. Scholarship awards will be made annually. Awards will be made after the campus financial aid package has been calculated (grants and scholarships and excluding loans)

and in coordination with other disaster relief financial aid. Awards will be made up to an amount not exceeding the cost (fees and tuition, special fees, books, room and board) of five continuous years of postsecondary education at any accredited college or university of an individual's choosing.

2. The award amount shall not exceed the average cost of enrollment fees, tuition and other fees, room and board, and all required textbooks or materials for the type of institution in which the student is enrolled in The Oklahoma State System of Higher Education. The award amount for a student enrolled in a private or out-of-state institution shall not exceed the award for an Oklahoma public institution of comparable type.

- B. Award continuation. Continued awards will be made to individuals who are making satisfactory progress toward a degree as defined by the financial aid office of the institution in which the student is enrolled.
- C. Disbursement. Funds may be disbursed by check to the institution at which the student is enrolled during the first six weeks of each semester and upon receipt of a net billing from the bursar of the institution. Funds may also be disbursed to the entity responsible for coordinating the payment of scholarships from all available sources. The State Regents shall verify documentation for scholarship disbursements to the coordinating entity in a similar manner to that required for disbursements directly to institutions.
- D. Refunds. Refunds resulting from student withdrawal will be remitted to the State Regents.
- E. Application.
 1. Before April 19, 1996, the State Regents will make every effort to contact guardians of all dependent children eligible for the Heartland Scholarship.
 2. Guardians and eligible recipients will be responsible for timely notification to the State Regents of address changes.

5.7.5 Trust funds (610:25-21-5)

- A. The Oklahoma State Regents for Higher Education will serve as the Board of Trustees for the Heartland Scholarship Trust and the Heart of the Heartland Scholarship Trust. The Board will invest the trust corpus in a reasonable and prudent manner, subject to further limitations and safeguards provided in existing, applicable State Regents' investment policies.
- B. Both the trust capital and earnings income for the trust funds will accrue to the fund and be used for the scholarship awards.

5.7.6 Administration (610:25-21-6)

- A. The Heartland Scholarship Fund shall be administered by the Oklahoma State Regents for Higher Education.
- B. Trust capital or income remaining in the Heartland Scholarship Fund after scholarships have been awarded to all eligible individuals, if any, shall be transferred to the Chancellor's Scholarship Fund which makes one-time \$1,000 awards to graduating high school students demonstrating community service and public leadership.
- C. Trust capital or income remaining after July 1, 2025, in the Heart of the Heartland Scholarship Fund established by the Legislature will be transferred and deposited into the General Revenue Fund.

5.7.7 Coordination (610:25-21-7)

The Heartland Scholarship Fund will coordinate with other disaster relief funds for the purpose of assisting victims with postsecondary financial assistance.

Approved June 28, 1995. Revised March 29, 1996 and February 7, 2002, Administrative Rule effective July 14, 1995, last amended May 28, 2002.

**5.8 OKLAHOMA HIGHER LEARNING ACCESS PROGRAM
(~~OHLA~~OKLAHOMA'S PROMISE)**

Administrative Rule Title 610 Chapter 25 Subchapter 23 (610:25-23)

5.8.1 Purpose (610:25-23-1)

A. The Oklahoma Higher Learning Access Program, created by the Oklahoma Higher Learning Access Act passed in 1992 (70 O.S. § 2601 et seq.), is designed to help provide access to postsecondary education opportunities for students with financial need who have demonstrated a commitment to academic success in high school. The program shall also be known as "Oklahoma's Promise". The Act identifies two primary purposes:

1. The first is to ensure that students who satisfy the requirements of the program, and who pursue an associate or baccalaureate degree in Oklahoma at an accredited public or private institution, or pursue studies in a postsecondary program or course offered through a cooperative agreement between a public technology center and an institution of The Oklahoma State System for Higher Education, are relieved of the burden of paying:
 - a. undergraduate resident nonguaranteed tuition at institutions of The Oklahoma State System for Higher Education;
 - b. tuition for enrollment in postsecondary programs or courses of a public technology center, not to exceed the amount the student would have received for comparable enrollment at a two-year institution within The Oklahoma State System of Higher Education; or
 - c. some portion of fees or tuition at a private institution of higher education in Oklahoma accredited pursuant to 70 O.S. § 4103.
2. The further purpose of the program is to establish and maintain a variety of support services whereby a broader range of the general student population of this state will be prepared for success in postsecondary endeavors. [70 O.S. § 2602]

5.8.2 Eligibility of participants (610:25-23-2)

A. Eligibility to participate in the program must be established by both the student and his/her parent(s), custodial parent(s), or guardian(s). Students enrolled in the eighth, ninth or tenth grade at a public or private school and whose parents' income meets the financial need criteria are eligible to apply to become a program participant. Students educated by other means who are between the ages of thirteen (13) and fifteen (15) are eligible to

apply to become a program participant. Eligibility requirements to participate in the program include the following:

1. The student must be a resident of the state of Oklahoma or be enrolled in a school district located in this state that serves students who reside in both this state and an adjacent state pursuant to a contract as authorized in Section 5-117.1 of Title 70 of the Oklahoma Statutes; and
2. The student's parent(s), custodial parent(s), or guardian(s) must establish financial need.
 - a. To meet the program's financial need criteria, the income of the student's parent(s) from taxable and nontaxable sources shall not exceed \$50,000 per year at the time the student applies for participation in the program. A student who was adopted while in the permanent custody of the Department of Human Services, in the court-ordered custody of a licensed private nonprofit child-placing agency, or federally recognized Indian tribe, as defined by the federal Indian Child Welfare Act, shall not be subject to the determination of financial qualification at the time the student applies for participation in the program.
 - b. Parents of students making application to the program must use one of the following options to establish financial need eligibility:
 - i. Documentation of their most recent calendar (tax) year income. Parents of tenth-grade applicants may use the calendar (tax) year income that coincides with the spring semester of the tenth-grade if the application is submitted by the required deadline; or
 - ii. Documentation of current yearly income from an officially approved application for free or reduced price school meals or other state or federal means-tested programs as determined by the State Regents. The State Regents may limit use of this option to pilot projects as determined by the State Regents. If requested by the State Regents, parents may be required to provide additional documentation of income.
 - c. For students that are subject to court-ordered joint custody arrangements, the OSRHE shall

use guidelines consistent with regulations for federal Title IV student financial aid programs to determine which parent(s) shall meet the financial need criteria.

5.8.3 Applications (610:25-23-3)

- A. Students and their parent(s), custodial parent(s), or guardian(s) must complete fully an application form provided by the Oklahoma State Regents for Higher Education (OSRHE). If a student's legal custody is the subject of an active legal proceeding, the student may submit an application without the information of their parent(s), custodial parent(s), or guardian(s). The application will be treated as an incomplete application per section (h) below until the student's legal custody is determined.
- B. The application shall include either:
 - 1. an agreement form upon which the school site contact person (see rule 610:25-23-8 for policies related to the contact person) shall certify that the student meets the financial need criteria and which verifies that the student and his/her parent(s), custodial parent(s), or guardian(s) agree to the program's requirements. The agreement form shall be retained in the student's permanent record and a copy forwarded to the OSRHE. A copy of the agreement form must be received by the OSRHE for the student to be considered enrolled in the program; or
 - 2. an agreement form submitted directly to the OSRHE by the student and their parent(s), custodial parent(s), or guardian(s), which shall be processed and verified by the OSRHE.
- C. Students participating in the Oklahoma Higher Learning Access Program shall provide their social security number, or their student identification number used by their local school, to the OSRHE. The OSRHE shall keep the numbers confidential and use them only for administrative purposes.
- D. Any falsified or incomplete information on the application forms may result in the student's disqualification from the program.
- E. Applications will be accepted throughout the school year.
- F. Contact persons should forward copies of agreement forms to the OSRHE monthly, but not later than June 30 of each school year.
- G. Persons applying directly to the OSRHE should submit agreement forms to the OSRHE no later than June 30. If June 30 is not a business day, agreement forms shall be submitted no later than the first business day thereafter. Applications mailed to the OSRHE must be postmarked by June 30, or the next

business day if applicable, to be considered timely submitted to the OSRHE.

- H. Applicants submitting incomplete applications shall be provided an opportunity to provide the required documentation to complete their application. An application that remains incomplete by the official date the student graduates high school or the last day of classes for the school year in which the student graduates, whichever is later, will not be accepted. Students that graduate high school early must complete the application by their official date of graduation.

5.8.4 Program requirements (610:25-23-4)

- A. Students shall agree to abide by the following provisions:
 - 1. Attend school regularly and to do homework regularly;
 - 2. Refrain from substance abuse;
 - 3. Refrain from commission of crimes or delinquent acts;
 - 4. Have school work and school records reviewed by mentors designated pursuant to the program;
 - 5. Provide information requested by the Oklahoma State Regents for Higher Education [OSRHE] or the State Board of Education; and
 - 6. Participate in program activities. [70 O.S. § 2605]
- B. The student's parent(s), custodial parent(s), or guardian(s) shall witness the student's agreement and further agree to:
 - 1. Assist the student in achieving compliance with the agreements;
 - 2. Confer, when requested to do so, with the school contact person, other school personnel, and program mentors;
 - 3. Provide information requested by the Oklahoma State Regents for Higher Education or the State Board of Education; and
 - 4. Assist the student in completing forms and reports required for program participation, making application to institutions and schools of higher learning, and filing applications for student grants and scholarships. [70 O.S. § 2605]
- C. Students in the program graduating high school in 2010 and thereafter must complete the following 17-unit core curriculum with a minimum 2.5 grade-point average (GPA) on a 4.0 grading scale, by the time they graduate from high school. For the purpose of calculating the required core curriculum GPA, core courses in English, lab science, mathematics, history and citizenship skills, foreign or non-English language, computer technology, or "additional" subject areas must be transcribed with a letter grade that has a corresponding numerical value. If

the school district assigns a course a grade of "pass" without a numerical value, the OSRHE will assign a letter grade of "D" or the lowest passing grade that the high school assigns to courses. If the required one unit, year, or set of competencies in fine arts (music, art, or drama) or speech is fulfilled on a pass/fail or competency basis, the course(s) will be accepted and excluded from the required core curriculum GPA calculation.

1. Four units, or years, of English (grammar, composition, literature; should include an integrated writing component);
 2. Three units, or years, of lab science (biology, chemistry, physics, or any lab science certified by the school district; general science with or without a lab may not be used to meet this requirement);
 3. Three units, or years, of mathematics (Algebra I, Algebra II, geometry, trigonometry, math analysis, pre-calculus [must have completed geometry and Algebra II], calculus, Advanced Placement Statistics);
 4. Three units, or years of history and citizenship skills (1 unit of American history and 2 units from the subjects of history, economics, geography, government and/or non-Western culture):
 5. Two units, or years, of a foreign or non-English language (both units, or years, of the same language), or Two units, or years, of computer technology (courses in programming, hardware, and business computer applications such as word processing, databases, spreadsheets and graphics will qualify; keyboarding and typing classes do not qualify);
 6. One additional unit, or year, of subjects listed above, or any Advanced Placement (AP) course except AP courses in applied fine arts (art history and music theory will count; studio art courses will not count);
 7. One unit, year, or set of competencies of fine arts (music, art, or drama) or speech.
- D. The program curricular requirements for English, science, mathematics, history and citizenship skills are identical with the curricular requirements for college admission set by the OSRHE. Any change by the OSRHE to the curricular requirements for college admission shall also apply to the OHLAP curricular requirements.
- E. Advanced students who complete core courses in earlier grades will not be required to take additional courses for purposes of the requirements of this program.
- F. Strict parameters regulate the substitution of applied courses (OSRHE Policy Statement on Admission to, Retention in and

Transfer Among Colleges and Universities of the State System).

- G. Exceptions to the required core curriculum will be considered according to the following:
 - 1. Students attending schools, or homeschool students participating in other education programs, which do not offer all of the core curriculum courses will be allowed to satisfy the requirements subject to the following provisions:
 - a. Core curriculum requirements which are also required for regular college admission (OSRHE Policy on Institutional Admission and Retention) will be subject to the OSRHE Policy on Remediation and Removal of High School Curricular Deficiencies.
 - b. Any other core curriculum requirements must be satisfied during the first twenty-four (24) hours of college coursework. Any exceptions to the twenty-four (24) hour limitation must be requested in writing and shall be subject to approval by the Chancellor.
 - 2. Students who have documented proficiency in a non-English language equivalent to at least two (2) units of high school study may be exempted from the requirement of two (2) units of a foreign or non-English language.
 - 3. Any other requests for exceptions to the core curriculum requirement must be submitted in writing to the Chancellor. Upon approval of the exception, the student may be eligible for program benefits; provided, such approval may require the satisfaction of any core curriculum requirements omitted in high school or other educational programs.
- H. Students must attain a minimum 2.5 cumulative GPA on a 4.0 grading scale for all work attempted in grades nine through twelve.
- I. Homeschool students and students graduating from a high school not accredited by the State Board of Education must achieve a composite score of 22 or higher on the ACT test or the equivalent SAT test score. Only ACT and SAT test scores from tests administered on national test dates prior to the student's high school graduation will be considered.

5.8.5 Securing program benefits (610:25-23-5)

- A. To qualify for the program benefits for the first semester or other academic unit of postsecondary enrollment, the participant must:
 - 1. Be a resident of this state both at the time of application

to the program and at the time the student graduates from high school, or have been enrolled in a school district located in this state that serves students who reside in both this state and an adjacent state pursuant to a contract as authorized in Section 5-117.1 of Title 70 of the Oklahoma Statutes.

2. Have graduated within the previous three years from a high school or other educational program if homeschooled. The Oklahoma State Regents for Higher Education (OSRHE) may award benefits for a student's first semester or other academic unit of postsecondary enrollment taken more than three (3) years after the student graduates from high school, or other educational program if homeschooled, if the student is a member of the Armed Forces of the United States, the Reserve Corps of the Armed Forces of the United States, or the Oklahoma National Guard, and is ordered to active duty or active duty for special work or training and due to the duty commitment the student is unable to enroll prior to the end of the three-year period. Such three-year period shall be extended by the length of the term of duty.
3. Have a record of satisfactory compliance with the agreements and program requirements described in 610:25-23-4. Students failing to comply with the agreement and program requirements shall not be eligible for awards. Compliance shall be verified by the local contact person upon a form provided by the OSRHE. Final verification of compliance shall be determined by the OSRHE. A copy of the student's final high school transcript shall be submitted by the local contact person with the student's verification form.
4. Have satisfied admission standards as established by the OSRHE for first-time-entering students for the appropriate type of institution (OSRHE Policy Statement on Admission to, Retention in and Transfer Among Colleges and Universities of the State System) or, if attending a private institution, satisfy the admission standards determined by the private institution; provided, that no student participating in the program shall be admitted into an institution of higher education by special admission standards.
5. Have secured admission to, and enrolled in, an institution which is a member of The Oklahoma State System of Higher Education, a postsecondary program offered pursuant to a duly approved cooperative agreement between a public technology center and an institution of The Oklahoma State System of Higher Education, or a private institution of higher learning located within this state and accredited pursuant to

Section 4103 of Title 70 of the Oklahoma Statutes.

6. Be a United States citizen or lawfully present in the United States. This provision shall not apply to any student that was enrolled in the program prior to the end of the 2006-07 school year.
- B. For students receiving the program benefit award for the first time in 2012-13 and thereafter, at the time the student begins postsecondary education and prior to receiving any program benefit award, the federal adjusted gross income of the student's parent(s) shall not exceed \$100,000 per year. The determination of financial qualification as set forth in this paragraph shall be based on the income of the student, not the income of the parent(s), if the student:
 - a. is determined to be independent of the student's parents for federal financial aid purposes,
 - b. was in the permanent custody of the Department of Human Services at the time the student enrolled in the program, or
 - c. was in the court-ordered custody of a federally-recognized Indian tribe, as defined by the federal Indian Child Welfare Act, at the time the student enrolled in the program.
 - C. A student who was adopted while in the permanent custody of the Department of Human Services, in the court-ordered custody of a licensed private nonprofit child-placing agency, or federally recognized Indian tribe, as defined by the federal Indian Child Welfare Act, shall be subject to the following financial qualification at the time the student begins postsecondary education and prior to receiving any program benefit award:
 - a. For a student adopted between birth and twelve (12) years of age, the federal adjusted gross income of the student's parent(s) may not exceed \$150,000 per year.
 - b. For a student adopted between thirteen (13) and seventeen (17) years of age, the federal adjusted gross income of the student's parent(s) may not exceed \$200,000 per year.
 - c. If the student is determined to be independent of the student's parents for federal financial aid purposes, the determination of financial qualification shall be based on the income of the student, not the income of the parent(s).
 - D. Award recipients shall apply for financial aid at the institution in which they enroll.
 - E. All students eligible to receive the program benefit award for

the first time in 2012-13 and thereafter must complete an application for federal student financial aid (Free Application for Federal Student Aid or FAFSA) or its equivalent. Students not eligible to complete the FAFSA will be provided an alternate method by the OSRHE. Income information submitted through the FAFSA, or an alternate method if necessary, shall be used to determine compliance with the income limits described in sections (b) and (c) above.

- F. Any person incarcerated in a state, federal, or private correctional facility shall not be eligible to receive program benefits.

5.8.6 Retaining eligibility in postsecondary education (610:25-23-6)

- A. To retain eligibility for program benefits while pursuing a program of higher learning in an institution of The Oklahoma State System of Higher Education, the student shall maintain good academic standing and satisfactory academic progress according to standards of the Oklahoma State Regents for Higher Education (OSRHE). Students attending an eligible private institution shall maintain good academic standing and satisfactory academic progress according to the standards of the institution in which they are enrolled [70 O.S. § 2603; OSRHE Policy II-2-46.3]
- B. Effective January 1, 2008 any student receiving the program benefit award that is expelled or suspended for more than one semester from an institution of higher education for conduct reasons shall permanently lose eligibility for program benefits.
- C. For students receiving the program benefit award for the first time in 2012-13 and thereafter, the student must achieve a minimum cumulative grade point average of 2.0 on a 4.0 scale or its equivalent for courses taken through the student's sophomore year and achieve a minimum grade point average of 2.5 on a 4.0 scale or its equivalent for courses taken during the student's junior year and thereafter.
 - 1. Any Oklahoma's Promise student with a cumulative grade point average of less than 2.0 upon the completion of sixty (60) earned semester credit hours, or its equivalent, shall permanently lose eligibility for program benefits. The cumulative grade point average at the end of the enrollment period during which the student completes their sixtieth (60th) earned semester credit hour, or its equivalent, shall be calculated by the institution in which the student is enrolled to determine compliance with this provision. The institution shall notify the OSRHE if the student fails to meet this requirement.
 - 2. To remain eligible for the award, an Oklahoma's Promise student must also achieve a 2.5 cumulative

grade point average for courses taken after the completion of sixty (60) earned semester credit hours, or its equivalent. The first check of this grade point average requirement will be conducted by the institution in which the student is enrolled at the end of the enrollment period during which the student completes their ninetieth (90th) earned semester credit hour, or its equivalent. The grade point average calculation shall include all earned semester credit hours, or their equivalent, starting with the enrollment period immediately following the enrollment period during which the student completed their sixtieth (60th) earned semester credit hour, or its equivalent. Thereafter, the institution in which the student is enrolled shall check the cumulative grade point average for courses taken after the completion of sixty (60) earned semester credit hours, or its equivalent, at the end of each enrollment period. Any student whose cumulative grade point average at the required check points is below 2.5, shall be ineligible for program benefits until the cumulative grade point average for courses taken after the completion of sixty (60) earned semester credit hours or its equivalent is raised to 2.5 or above. Any period of ineligibility for failure to meet the requirements of this provision shall count against the student's maximum time period of award eligibility.

3. For institutions within the Oklahoma State System of Higher Education, the student's grade point average shall be calculated using the methodology defined as "Cumulative Grade Point Average" in the OSRHE policy on grading.

D. Beginning in 2012-13, all Oklahoma's Promise students receiving the award in college will be required to meet federal satisfactory academic progress (SAP) standards as defined by the institution in which they are enrolled. This requirement is in addition to the statutory GPA requirement described in section (c) above and will apply to all Oklahoma's Promise award recipients whether or not they are receiving federal student financial aid. Any Oklahoma's Promise student that is ineligible to receive federal financial aid due to failure to meet SAP standards will also be ineligible to receive the Oklahoma's Promise award.

5.8.7 Payment of awards; policies and limitations (610:25-23-7)

A. Eligible students enrolled at an institution in The Oklahoma State System of Higher Education shall have an award equivalent to their undergraduate resident nonguaranteed tuition paid to the institution on the student's behalf by an allocation from the Oklahoma Higher Learning Trust Fund [70 O.S. § 3953.1];

- B. Eligible students enrolled in a duly accredited private Oklahoma institution of higher education [70 O.S. § 4103] shall have awards paid to the institution on the student's behalf by an allocation from the Oklahoma Higher Learning Access Trust Fund in an amount equivalent to the average undergraduate resident nonguaranteed tuition if the student were enrolled in a comparable institution of The Oklahoma State System of Higher Education. Comparability of institutions shall be determined by the OSRHE;
- C. Eligible students enrolled in a postsecondary program offered through a cooperative agreement between a public technology center and an institution of The Oklahoma State System of Higher Education shall have an award equivalent to tuition paid, not exceeding the amount the student would have received for comparable enrollment at a two-year institution within The Oklahoma State System of Higher Education, to the school or institution on the student's behalf by an allocation from the Oklahoma Higher Learning Access Trust Fund;
- D. Funds shall be transferred by the OSRHE from the Oklahoma Higher Learning Access Trust Fund to the institution in which the student is enrolled. No funds shall be paid directly to the student;
- E. Payment will not be allowed for courses taken in excess of those required for a baccalaureate degree;
- F. Students will be eligible for the benefits outlined in this policy for five (5) years from the first date of postsecondary enrollment. The Oklahoma State Regents for Higher Education may award the Oklahoma Higher Learning Access Program benefits for courses of postsecondary units taken more than five (5) years after the student's first semester of postsecondary enrollment only in hardship circumstances; provided, however, no Oklahoma Higher Learning Access Program participant may receive benefits beyond a cumulative time period of five (5) years [70 O.S. § 2604]. Hardship circumstances may include, but are not limited to, sickness, injury, required military service, or service required by the student's religious or cultural traditions;
- G. There will be no limit to the number of awards other than the amount of funds available or the number of eligible students. If sufficient funds are not available to provide awards for all eligible applicants, the OSRHE shall make awards on the basis of need;
- H. Students who have previously received awards shall have priority over students applying for initial awards;
- I. The Oklahoma State Regents for Higher Education shall take into consideration other grants and scholarships received by an eligible applicant when making awards [70 O.S. § 2604].

Award recipients may not receive financial aid in excess of his/her cost of attendance as determined by the institution in which the student is enrolled. The cost of attendance determined by the institution shall be consistent with regulations for federal Title IV student financial aid programs. If necessary, an award shall be reduced by an amount which makes the student's total financial aid equivalent to the student's identified cost of attendance.

5.8.8 Administrative responsibilities (*APA Rule - 610: 25-23-8*)

The Oklahoma Higher Learning Access Act established administrative roles and responsibilities for the Oklahoma State Regents for Higher Education (OSRHE) and the State Board of Education.

1. Every public school district shall designate at least one contact person at each Oklahoma public school site in which eighth, ninth- or tenth-grade classes are taught. When requested by the OSRHE, the State Board of Education shall assist the OSRHE to ensure the designation of contact persons. Private schools shall also designate at least one school official as a contact person. For students who are educated by other means, a parent or guardian or other person approved by the OSRHE shall be designated as the contact person. [70 O.S. § 2605]
 - a. The contact person shall be responsible for processing student applications for the program according to the rules and regulations established by the OSRHE.
 - b. The contact person shall maintain the agreements, which shall be executed on forms provided by the OSRHE.
 - c. The local contact person shall:
 - i. monitor the student's compliance with the terms of the agreement;
 - ii. document transfer out of state, death, and other conditions; and
 - iii. report on circumstances of noncompliance to the OSRHE.
 - d. Compliance with the program requirements for attending school regularly, refraining from substance abuse, and refraining from criminal or delinquent acts shall be determined according to the local school district's policy.
 - e. The local district contact person shall report program participants who transfer into or out of the district to the OSRHE and identify the local

- education agency (LEA) and site from which or to which the student transferred.
- f. Beginning in April of the student's year of graduation, the local contact person shall gather from the program participants and his/her records, information which substantiates whether or not the program requirements have been met.
 - g. The student's program verification form should be completed, signed, dated, and forwarded to the OSRHE as soon after the student's graduation as possible.
2. The local school district where an Oklahoma Higher Learning Access Program student is attending when the student begins participation in the program and any subsequent school district where the student attends shall forward information regarding the student's participation in the program to a school to which the student transfers upon the school's request for the student's records. [70 O.S. § 2605]
3. The Oklahoma State Regents for Higher Education shall:
- a. designate personnel to coordinate tracking of program records for the years when students participating in the program are still in the public schools, provide staff development for contact persons in the public schools, and provide liaison with the State Board of Education and local organizations and individuals participating in the program [70 O.S. § 2605];
 - b. coordinate and develop policies and procedures to implement the Oklahoma Higher Learning Access Act;
 - c. coordinate the publication and distribution of program awareness information and materials;
 - i. Each school year, every fifth- through ninth-grade student in the public and private schools of Oklahoma and students educated by other means who are in the equivalent of the fifth through ninth grade shall be apprised, together with his/her parents, custodial parent, or guardian, of the student's opportunity for access to higher learning under the Oklahoma Higher Learning Access

Program [70 O.S. § 2605];

- ii. The OSRHE and the State Board of Education shall develop, promote, and coordinate a public awareness program to be utilized in making students and parents aware of the program [70 O.S. § 2605];
- d. coordinate the provision of technical assistance to local school districts and individual participants;
- e. administer the Oklahoma Higher Learning Access Trust Fund;
- f. process applications submitted directly to the OSRHE;
- g. determine final eligibility for the program award.

5.8.9 Heroes Promise (APA Rule – 610:25-3-9)

HB 1343 of the 2011 Oklahoma legislative session amended the Oklahoma Higher Learning Access Act to authorize certain persons to participate in the Oklahoma Higher Learning Access Program and to qualify for the program benefits. This category of program participation shall be referred to as the "Heroes Promise" program. Except as otherwise provided in this section, the administrative rules of the Oklahoma Higher Learning Access Program shall apply to participants in the Heroes Promise program.

1. Eligibility: A Student shall be eligible to participate in the Heroes Promise program if the student meets the following criteria:
 - a. The student is a child of any person killed after January 1, 2000, in the line of duty in any branch of the United States Armed Forces or who died after January 1, 2000, as a result of an injury sustained while in the line of duty in any branch of the United States Armed Forces and the person who was killed or died filed an individual or joint Oklahoma income tax return for the tax year prior to the year during which the person was killed or died.
 - b. The student is a resident of Oklahoma or is enrolled in a school district located in this state that serves students who reside in both this state and an adjacent state pursuant to a contract as authorized in Section 5-117.1 of Title 70 of the Oklahoma Statutes.
 - c. The student executes an agreement to participate in the program.

2. Application and Enrollment:

- a. Eligible students enrolled in a public or private school in the eighth-, ninth-, or tenth-grade, and eligible students educated by other means between the ages of thirteen (13) and sixteen (16) may apply to participate in the program.
 - b. Eligible students who have completed the tenth grade or who have reached age sixteen (16) shall be given the opportunity to apply to participate in the program prior to reaching the age of twenty-one (21).
 - c. An eligible student shall not be required to establish financial need as described in 610:25-23-2(2).
 - d. To apply, the student and/or their parent , custodial parent, or guardian shall submit appropriate documentation of eligibility including but not limited to:
 - i. A copy of an individual or joint Oklahoma income tax return filed by the parent of the student for the tax year prior to the year during which the parent was killed or died.
 - ii. Documentation of the parent's death after January 1, 2000 while in the line of duty or as a result of injury sustained while in the line of duty in any branch of the United States Armed Forces.
 - iii. Documentation that the student is a resident of Oklahoma or is enrolled in a school district located in this state that serves students who reside in both this state and an adjacent state pursuant to a contract as authorized in Section 5-117.1 of Title 70 of the Oklahoma Statutes.
3. Exemption from Oklahoma Higher Learning Access Program Requirements: Students eligible for the Heroes Promise program shall not be subject to the program requirements contained in 610:25-23-4 (Program requirements).
4. Securing Program Benefits: An eligible student may qualify for a Heroes Promise award which includes payment of an amount equivalent to resident tuition or other tuition pursuant to Section 2604 of Title 70 of the Oklahoma Statutes for the first semester or other academic unit of postsecondary enrollment if the student meets the following criteria:

- a. The student has satisfied admission standards as determined by the Oklahoma State Regents for Higher Education for first-time-entering students for the appropriate type of institution, or, if attending a private institution, has satisfied admission standards as determined by the private institution. No student participating in the Heroes Promise program shall be admitted into an institution of higher education by special admission standards.
 - b. The student has secured admission to, and, prior to reaching the age of twenty-one (21), has enrolled in an institution which is a member of The Oklahoma State System of Higher Education, a postsecondary vocational-technical program offered pursuant to a duly approved cooperative agreement between a technology center school and an institution of The Oklahoma State System of Higher Education, or a private institution of higher learning located within this state and accredited pursuant to Section 4103 of Title 70 of the Oklahoma Statutes. The Oklahoma State Regents for Higher Education may award the Heroes Promise benefit for a student's first semester or other academic unit of postsecondary enrollment taken after the student turns twenty-one (21) years of age if the student is a member of the Armed Forces of the United States, the Reserve Corps of the Armed Forces of the United States, or the Oklahoma National Guard, and is ordered to active duty or active duty for special work or training and due to the duty commitment the student is unable to enroll before the student reaches twenty-one (21) years of age. The period of the extension shall be the length of the term of duty.
 - c. Except as otherwise provided in this section, students eligible for the Heroes Promise award benefits shall not be subject to the provisions of 610:25-23-5 (Securing Program benefits).
 - d. Except as otherwise provided in this section, the payment of Heroes Promise award benefits shall be subject to the provisions of 610:25-23-7 (Payment of awards; policies and limitations).
 - e. A student that qualifies for the Oklahoma Higher Learning Access Program benefit based on both their Heroes Promise eligibility and completion of the regular program requirements shall only receive a single program benefit.
5. Retaining Eligibility in Postsecondary Education: To retain eligibility for the Heroes Promise award while

pursuing a program of higher learning at an eligible Oklahoma institution, the student must maintain compliance with the provisions of 610:25-23-6 (Retaining eligibility in postsecondary education)

[Source: Added at 13 Ok Reg 767, eff 10-24-95; Added at 13 Ok Reg 1377, eff 5-13-96; Amended at 14 Ok Reg 164, eff 10-15-96 (emergency); Amended at 14 Ok Reg 1419, eff 5-12-97; Amended at 17 Ok Reg 3062, eff 7-13-00; Amended at 18 Ok Reg 1779, eff 5-25-01; Amended at 19 Ok Reg 2962, eff 7-23-02 (emergency); Amended at 20 Ok Reg 2572, eff 7-11-03; Amended at 20 Ok Reg 2592, eff 7-11-08; Amended at 29 Ok Reg 677, eff 5-25-2012]

Adopted by the State Regents May 27, 1994. Last revised on January 26, 2012, Permanent Rule effective October 24, 1995, last amended effective May 25, 2012.

5.9 **GEORGE AND DONNA NIGH SCHOLARSHIP**

5.9.1 Purpose

- A. The 1999 Oklahoma Legislature authorized the Oklahoma State Regents for Higher Education to establish the George and Donna Nigh Scholarship. The goal of the scholarship, as an activity of the George and Donna Nigh Public Service Institute, is to provide scholarship opportunities to outstanding students who are preparing for careers in public service. A component of the scholarship program is participation in seminars on public service offered by the institute.

5.9.2 Eligibility Requirements

- A. To be eligible for the George and Donna Scholarship, an applicant shall:
 - 1. Be an Oklahoma resident.
 - 2. Have enrolled full-time as an undergraduate at an institution in the Oklahoma State Regents System of Higher Education or Oklahoma Baptist University, Oklahoma Christian University, Oklahoma City University, Oral Roberts University, Southern Nazarene University, The University of Tulsa, Bacone College, and St. Gregory's University.
 - 3. Be enrolled in a degree program leading to a career in public service as determined by the George and Donna Nigh Public Service Institute.
 - 4. Demonstrate exceptional academic achievement as evidenced by a number factors which may include grade point average, class rank, national awards, scholastic achievement, honors, teachers' recommendations, and the applicant's involvement in extracurricular activities.

5.9.3 Nomination and Selection of Recipients

- A. Presidents of participating institutions of higher education will be invited to submit a nominee for consideration of award prior to the beginning of the spring semester.
- B. An advisory committee appointed by the George and Donna Nigh Institute will review and approve the nominations and make announcement of awards.

5.9.4 Fiscal Limits

- A. Scholarships will be awarded on a yearly basis and are not renewable.
- B. Each participating college or university may nominate one scholarship recipient each year.

Policy Effective August 27, 1999

5.10 **RENEE NEUWALD MEMORIAL SCHOLARSHIP**

5.10.1 Purpose

- A. This scholarship is to honor the lifelong contributions of Renee Neuwald to the teaching profession.
- B. The goal of the Renee Neuwald Memorial Scholarship is to provide scholarship opportunities to outstanding students with financial need who are graduates as Tulsa High School of Science and Technology in Tulsa, Oklahoma.

5.10.2 Eligibility Requirements

- A. To be eligible for the Renee Neuwald Memorial Scholarship, an applicant shall:
 - 1. Be an Oklahoma resident.
 - 2. Graduate from Tulsa High School of Science and Technology in Tulsa, Oklahoma with a grade point average of 3.00 or better.
 - 3. Demonstrate financial need.

5.10.3 Nomination and Selection of Recipients

- A. Tulsa High School of Science and Technology shall nominate five to six students to the Oklahoma State Regents for Higher Education by March 15th of each year.
- B. Sponsors of the Neuwald scholarship will select one student from the nominees to be awarded. The State Regents will notify the student and Tulsa High School of Science and Technology of the award.

5.10.4 Fiscal Limits

- A. Scholarships will be awarded on a yearly basis and are not renewable.

Policy Effective April 7, 2000

5.11 FUTURE TEACHERS' SCHOLARSHIP PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 9 (610:25-9)

5.11.1 Program purpose (610:25-9-1)

- A. Senate Bill No. 228 of the 1985 Oklahoma Legislature authorized the Oklahoma State Regents for Higher Education . . . to establish and maintain an incentive scholarship program to encourage the preparation of teachers in critical shortage areas for the public schools at one or more of the Oklahoma public or private higher education institutions. Prospective teachers, whether planning to pursue an undergraduate teacher education program or to become qualified to teach after earning a bachelor's degree in a critical shortage area, shall be considered if they have graduated from high school with a grade point average ranking them in the top fifteen percent (15%) of their graduating class. To the extent that funds are available, scholarships of One Thousand Five Hundred Dollars (\$1,500.00) per year, renewable for up to three (3) additional years, shall be awarded to cover costs of general enrollment fees, other fees, books, materials, and services provided by the institution, including room and board. [70:698.1]
- B. The purpose of the Future Teachers' Scholarship Program is to address teacher shortages in critical areas of the public schools in Oklahoma by making scholarships available to undergraduate and graduate students who meet the eligibility criteria and demonstrate an interest in teaching in those fields.

5.11.2 Eligibility (610:25-9-2)

- A. Individuals who are residents of Oklahoma who have demonstrated a commitment to obtain the necessary credentials to teach in a critical shortage area shall be eligible for consideration if they have:
 - 1. Graduated from high school with a cumulative grade point average which ranks them in the top fifteen percent (15%) of their high school graduating class; OR
 - 2. Scored at or above the eighty-fifth (85th) percentile on the ACT or other similar acceptable battery of tests; OR
 - 3. Been admitted to a professional education program at an accredited Oklahoma institution of higher education; OR
 - 4. Achieved an undergraduate record of outstanding success, as defined by the institution.
- B. Scholarship recipients must maintain no less than a 2.5 cumulative grade point average to remain eligible for renewal of the scholarship; it is expected, however, that renewal recipients will attain a 3.0 cumulative grade point average or better.

- C. Each scholarship recipient shall have agreed to teach in a shortage area in the public schools in Oklahoma for a minimum of three (3) consecutive years upon graduation and licensure as a teacher.
- D. Either full- or part-time students may be eligible; however, highest priority will be given to full-time students.

5.11.3 Grants and payments (610:25-9-3)

- A. Provided that funds are available, the scholarship award for students pursuing study under the Future Teachers' Scholarship Program will be based on the following scale:

Enrollment	Hours Completed	Maximum Award Toward Baccalaureate Degree
Full-time	60 hours and above	\$1,500
Full-time	Less than 60 hours	\$1,000
Part-time	60 hours and above	\$ 750
Part-time	Less than 60 hours	\$ 500

- B. For purposes of this policy, full-time enrollment means not less than 12 hours per semester for undergraduates and not less than 9 hours per semester for graduate students. Part-time enrollment means not less than 6 hours per semester.
- C. Upon enrollment verification by the institution, the first payment of each recipient's entitlement will be distributed during the fall semester, and the second distribution will be during the spring semester.
- D. The award will be paid directly to the institution on the student's behalf with appropriate restrictions and conditions that such monies be expended only for the purposes authorized by State Statute.

5.11.4 Maximum limitations (610:25-9-4)

- A. Recipients may receive the Future Teachers' Scholarship Program grant, which is to be awarded annually on a competitive basis, for not more than four years or the equivalent of four years of full-time study.

5.11.5 Study load requirements (Revoked) (610:25-9-5)

5.11.6 Certifications of compliance (Revoked) (610:25-9-6)

5.11.7 Nomination procedures (610:25-9-7)

- A. Applicants shall complete the required application form and submit it to the institution.
- B. Institutions shall review applications and nominate candidates for the scholarship to the State Regents. Institutions shall rank candidates in priority order and recommend an award amount

for each candidate.

- C. Institutions may submit alternate candidates, also ranked in priority order.
- D. Institutions must certify that first time applicants meet the eligibility criteria (610:25-9-2) and provide supporting documents when submitting the applications.
- E. Institutions shall certify that renewal nominees have:
 - 1. demonstrated scholarship and continued professional growth. In general, a 3.0 cumulative grade point average is expected; any student failing to maintain a 2.5 cumulative grade point average shall be disqualified; and
 - 2. enrolled in an approved program of study; and
 - 3. demonstrated progress in meeting requirements for licensure and certification.
- F. Institutions shall provide to the State Regents documentation of the method of candidate selection used.
- G. The State Regents shall convene an advisory committee to recommend scholarship recipients to the Regents.
- H. The State Regents shall notify both recipients and institutions of the award.

Approved by the Oklahoma State Regents for Higher Education on June 26, 1985, Revised April 23, 1993. Permanent Rule effective June 16, 1993, last amended effective July 25, 2003.

5.12 PAUL DOUGLAS TEACHER SCHOLARSHIP

5.12.1 Purpose (610:25-11-1)

The Paul Douglas Teacher Scholarship Program (formerly Congressional Teacher Scholarship Program) is authorized under Title VI, Part D, Subpart 1, of the Higher Education Act of 1965, as amended by the Higher Education Amendments of 1992, codified at 20 U.S.C., 1111 et. seq. The purpose of the program is to provide scholarships to outstanding secondary school graduates who demonstrate an interest in teaching in order to enable and encourage those individuals to pursue teaching careers in education at the preschool, elementary, or secondary levels.

5.12.2 Requirements (610:25-11-2)

Substantive requirements for participation in this program are specified by federal law (the Higher Education Act of 1965, as amended by the Higher Education Amendments of 1992) and regulations of the U.S. Department of Education. These federal law requirements are incorporated, herein, by reference. These federal law requirements, which are subject to change without notice, are available for inspection and copying at the offices of the Oklahoma State Regents for Higher Education.

5.12.3 Application procedure (Revoked) (610:25-11-3)

5.12.4 Selection procedure (Revoked) (610:25-11-4)

5.12.5 Grants and payments (Revoked) (610:25-11-5)

5.12.6 Terms and conditions of scholarship (Revoked) (610:25-11-6)

5.12.7 Eligibility to remain in program [Expired] (610:25-11-6.1)

5.12.8 Failure to meet commitment/repayment; required documentation (Revoked) (610:25-11-7)

5.12.9 Eligibility to remain in program (Revoked) (610:25-11-8)

5.12.10 Appeal procedure for noncompliance (610: 25-11-9)

- A. A panel of the State Regents' staff appointed by the Executive Vice-Chancellor will conduct an immediate hearing for the Paul Douglas Teacher Scholarship recipients deemed to be in noncompliance with any portion of the award agreement if such recipients submit a written request for such a hearing to the State Regents within 30 days after notification of noncompliance.
- B. A staff investigation may be conducted as the situation warrants followed by attempts to achieve a conciliation agreement.
- C. If the issues are resolved and an agreement acceptable to the concerned parties is reached, the Oklahoma State Regents for Higher Education will formally notify the scholar that the issue has been settled. However, if the issues are not resolved after a period of fifteen (15) working days from the date the recipient

is determined to be in noncompliance, the State Regents will take appropriate action to bring the recipient into compliance.

- D. In compliance with the federal regulations [34 CFR 653.42], the scholar has the right to appeal any determination of noncompliance. The scholar must notify the Oklahoma State Regents for Higher Education of any claim to the exception and provide supporting documentation as required by the Oklahoma State Regents for Higher Education. The appellant must file appropriate forms with the Oklahoma State Regents for Higher Education as applicable to the conditions of the appellant.

Approved August 27, 1986. Revised September 23, 1993.

5.13 CHIROPRACTIC EDUCATION ASSISTANCE PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 19 (610:25-19)

5.13.1 Purpose (610:25-19-1)

The Oklahoma State Regents Chiropractic Education Scholarship Program was created and funded by the Oklahoma Legislature and is administered by the Oklahoma State Regents and the Oklahoma State Board of Chiropractic Examiners. The scholarship is an incentive for residents of the State who are pursuing the study of chiropractic at accredited colleges and making satisfactory progress in their study.

5.13.2 Application procedure (610:25-19-2)

Applications for scholarships must be submitted to the office of the Oklahoma State Regents for Higher Education, by the specified deadline. The applications will be forwarded by the State Regents to the Oklahoma State Board of Chiropractic Examiners for approval of awards. A renewal application each year is not required.

5.13.3 Eligibility (610:25-19-2.1)

Preference in the granting of scholarships shall be given to those individuals with the highest weighted scholastic averages, provided the individuals are found to have those qualities and attributes that give a reasonable assurance of completion of the course of study required for a degree of doctor of chiropractic. To be eligible for the Chiropractic Education Assistance Program an applicant must:

1. be a legal resident of the State of Oklahoma for not less than five (5) years prior to the date of application,
2. be enrolled in or have been accepted to an accredited chiropractic college,
3. be making satisfactory progress in the study of chiropractic as defined by the Oklahoma State Board of Chiropractic Examiners.
4. meet all requirements and academic standards established by the Oklahoma State Board of Chiropractic Examiners; and
5. have earned a 3.00 cumulative grade point average if the individual is a continuing student.
 - a. Scholarship awardees under this program shall maintain a 3.00 cumulative grade point average. The cumulative grade-point average will be determined after the summer trimester for fall scholarship eligibility, and after the fall trimester for spring scholarship eligibility.
 - b. Awardees who fail to meet the 3.00 cumulative grade point average requirement will be removed from the program without scholarship assistance.

- c. Reinstatement to the program will be granted if the student achieves a 3.00 trimester grade point average within the following three trimesters. The student must submit a letter of appeal to the Oklahoma State Board of Chiropractic Examiners in order to be considered for reinstatement. A participant may be reinstated only one time.
- d. The Oklahoma State Board of Chiropractic Examiners will submit to the State Regents' Office notification in writing of any student reinstatement and authorization for payment of scholarship awards.

5.13.4 Notice of approval (610:25-19-3)

The Oklahoma State Regents for Higher Education shall forward all applications to the Oklahoma State Board of Chiropractic Examiners and, upon their recommendation, shall notify each applicant of the disposition of his or her application for assistance for the fiscal year.

5.13.5 Eligibility [AMENDED AND RENUMBERED TO 5.13.3] (610:25-19-4)

5.13.6 Amount of assistance (610:25-19-5)

Funds available for the Chiropractic Education Scholarship Program will be awarded to qualified students each fiscal year as follows: 17% to be divided equally among first year students; 17% to be divided equally among second year students; 33% to be divided equally among third year students and 33% to be divided equally among fourth year students. Annual awards may not exceed \$6,000 per student. Upon certification of renewal eligibility, payment of the scholarship award will be sent to the college in direct payment to the student.

5.13.7 Payments [REVOKED] (610:25-19-6)

5.13.8 Notification of change of address [REVOKED] (610:25-19-7)

Approved November 24, 1986. Revised January 19, 1994 and May 25, 2001. Administrative rules effective March 24, 1994, last amended effective May 25, 2001.

5.14 TEACHER SHORTAGE EMPLOYMENT INCENTIVE PROGRAM

Administrative Rule Title 610 Chapter 25 Subchapter 27 (610:25-27)

5.14.1 Purpose (610:25-27-1)

- A. The Teacher Shortage Employment Incentive Program (TSEIP) was created by Senate Bill 1393 during the 200 legislative session.
- B. The bill, as amended by Section 5, Chapter 201, O.S.L. 2001, expressed the legislative intent that beginning with the 2001-2002 school year, the Oklahoma State Regents for Higher Education (OSRHE) establish a teacher shortage employment incentive program providing for students enrolled in a major course of study in mathematics or science at the undergraduate level or graduate level who declare an intention to serve and who subsequently serve this state by teaching in a secondary level public school of this state for a minimum of five (5) years in the subject areas of mathematics or science. [70 O.S §698.3(A)].
- C. The implied purpose of this legislation is to provide an incentive for students who major in mathematics or science to serve as teachers of mathematics and science in Oklahoma public secondary schools for at least five (5) years.

5.14.2 Eligible student loans (610:25-27-1)

- A. Eligible student loans under the TSEIP are those educational loans that were obtained by the participant to defray the cost of obtaining a baccalaureate degree or graduate degree in a science or mathematics teacher education program. The specific loans include:
 - 1. Stafford Student Loans/Guaranteed Student Loans
 - 2. Perkins/National Direct Student Loans
 - 3. Loans made to students made pursuant to the federal Supplemental Loans for Students program including CLAS
 - 4. Consolidation Loan Program loans
 - 5. Privately funded educational loans issued to students through institutions of higher education
 - 6. Graduate PLUS Loan
- B. Ineligible student loans include Parent loans for students (PLUS).

5.14.3 Application procedure (610:25-27-3)

- A. OSRHE is authorized to distribute TSEIP Participation Agreement forms to post-secondary institutions in the State System of Higher Education that are eligible to participate in state and federal financial aid programs and have an approved

program of professional teacher preparation.

- B. TSEIP Participation Agreement forms may be obtained from TSEIP coordinator in each post-secondary institution or from the OSRHE. The student is responsible for the completeness of the application.
- C. A Participation Agreement must be signed by a student while enrolled in a mathematics or science major course of study at the undergraduate or graduate level.
- D. The completed Participation Agreement must be submitted to the TSEIP coordinator no later than the date of their graduation.
- E. Post-secondary institutions TSEIP coordinators will submit copies of the TSEIP Participation Agreements to the State Regents' office within 10 days of their submission.
- F. The State Regents will notify each applicant of the receipt of his/her application in the program, the educational loan obligation, and the disbursement benefits under the TSEIP.
- G. If an eligible student failed to enroll in TSEIP before graduation, he/she can file for late enrollment into the program within one year from date of graduation. The late enrollment process is as follows:
 - 1. A candidate must obtain a TSEIP Participation Late Agreement Form from the College of Education (COE) which recommended licensure in undergraduate or graduate education degree in secondary mathematics or science. The participant must provide explanation for the late enrollment.
 - 2. The form must be signed by the TSEIP coordinator of the respective College of Education.
 - 3. All documents must be submitted to the OSRHE for consideration as soon as the candidate learns about TSEIP but no later than **one year** from his/her graduation date.
 - 4. Additional documentation may be requested by the OSRHE before determining the eligibility of the late enrollees.

5.14.4 Coursework requirements for participant eligibility (610:25-27-4)

In order to satisfy the coursework requirements of the program, the participant must:

- 1. Declare an intention to teach in Oklahoma and graduate from an Oklahoma teacher education program.
- 2. Maintain satisfactory progress in an academic program leading to an undergraduate or graduate degree with a major in a mathematics or science teacher education program.

3. Complete coursework and training necessary to obtain a teaching certificate, which requires a baccalaureate degree or graduate degree and completion of an approved program of professional teacher preparation. The teacher preparation program shall include a student teaching requirement and authorize service for the secondary level.
4. Participant must not have been certified to teach mathematics or science prior to signing the Participation Agreement.

5.14.5 Educational loan obligations for participant(s) with outstanding student loan debt (610:25-27-5)

In order to satisfy the educational loan obligation of the program, the Participant with outstanding student loan debt must:

1. Not rely on any TSEIP benefit disbursement to replace any scheduled student loan payment that is due and owing to any student loan holder.
2. Provide written notification to OSRHE of change of status on student loans, including notice of delinquency/default and the sale, transfer or consolidation of student loans to another lender or servicer.
3. Be free of any obligation to repay any state or federal educational grant and not be delinquent or in default on any state or federally insured educational loan. If, at any time, it is determined that a participant owes a grant refund or is in default on a loan, and has not made satisfactory payment arrangements, Participant will be withdrawn from the TSEIP.

5.14.6 Participant eligibility for benefits of the TSEIP (610:25-27-6)

In order to qualify to receive disbursement benefits under the TSEIP, the Participant must have:

1. Obtained an initial teaching license and then a certificate and provided eligible full-time teaching service under a regular teaching contract at an Oklahoma public school:
 - a. at the secondary level,
 - b. for five (5) consecutive school years,
 - c. in the mathematics or science subject areas.
2. Completed the five years of teaching, as required, with not less than seventy-five percent (75%) of the teaching assignment meeting the criteria, set forth in paragraph (1) herein.
3. Completed the first full year of eligible full-time teaching service, as described above, within twenty-five

(25) months from the date of graduation from a four-year institution in Oklahoma.

4. Notwithstanding the provisions of this subparagraph, Participants may apply to the employing school for a leave of absence when a serious illness, pregnancy or other natural cause prevents the Participant from continuing the coursework requirements or from providing consecutive full-time teaching service.
 - a. Leaves of absence may not exceed more than one academic year and will not be included for the purpose of calculating the consecutive five (5) years of teaching service.
 - b. Participants must present official school documentation to the OSRHE that a leave of absence was granted which meets the provisions of these rules. Official notification must be given within one year that the teacher has resumed the teaching duties or Participant may be withdrawn from the program.
5. A Reduction in Force will not eliminate a Participant from fulfilling the consecutive five-year obligation if the following provisions are met:
 - a. Participant must provide to the OSRHE official documentation of the Reduction in Force.
 - b. Participant must resume teaching mathematics or science at the secondary level at an Oklahoma public school within eighteen (18) months after the Reduction in Force.

5.14.7 Benefits to be disbursed under the program (610:25-27-7)

- A. Under the provisions of the TSEIP, the OSRHE, are authorized to make the employment incentive payments to persons who actually render a minimum of five (5) years of service as teachers in the public schools of this state if not less than seventy-five percent (75%) of the teaching assignment meets the criteria [70 O.S. §698.3(B)], specified above.
- B. An Employment Compliance Form must be submitted to OSRHE upon completion of the 5th year of eligible teaching service. An authorized school official must complete the form.
- C. Depending on the June 30 student loan balance of any qualifying participant, as of the year that all program requirements are satisfied, and contingent upon the availability of funds, OSRHE will issue disbursements of program benefits directly to the qualifying participants for the repayment of eligible student loans.
- D. The total amount of employment incentive payments for any qualified person shall not exceed an amount equal to three times

the average annual cost of undergraduate resident tuition and fees for, full-time enrollment at institutions which offer teacher education programs within The Oklahoma State System of Higher Education, as defined by the State Regents. [70 O.S. §698.3(B)]

- E. Eligible loans will be repaid by the Participant in the following priority:
 - 1. First, all loans guaranteed by OSRHE, ranked first by rate of interest (highest to lowest) and secondly, by loan disbursement date (oldest to newest).
 - 2. Second, all other eligible loans ranked first by rate of interest (highest to lowest) and secondly, by loan disbursement date (oldest to newest).
- F. Any amount in excess of the Participant's outstanding student loan balance, or the entire benefit amount for the participants with no outstanding student loan balance, shall be paid directly to any person eligible for employment incentive payments pursuant to this section.
- G. If OSRHE determines that any TSEIP disbursement was authorized based on misleading or incorrect information, the Participant must reimburse such payment to OSRHE.

5.14.8 Fiscal limitations of the program (610:25-27-8)

- A. If insufficient funds are available for employment incentive payments to qualified persons during any fiscal year, the Chancellor may make reductions in the payments made to those qualifying. [70 O.S. §698.3(D)].
- B. Each year the benefit to all eligible teachers will be determined on, or as of June 30, for the group of teachers that achieved eligibility for TSEIP benefits (having satisfied all program requirements) by the end of that school year. If, in any given year, funds are not available for employment incentive payments at the maximum amount, due to a reduction in employment incentive payments as determined by the Chancellor, the amount to be disbursed to all eligible participants will be reduced uniformly. Upon distribution of that amount, the obligation of the program to those eligible teachers shall be satisfied. The foregoing is true even if no funds are available for disbursement.

5.14.9 Verification and notification requirements (610:25-27-9)

- A. Verification requirements which must be satisfied prior to disbursement of program benefits include:
 - 1. An Employment Compliance Form submitted to OSRHE after the fifth year of eligible teaching service. An authorized school official must complete the form.
 - 2. The Loan Balance Verification Form must be submitted

to OSRHE in the fifth year. The lender(s) must certify that the loans are in good standing and provide a June 30 balance.

- B. Until all mutual obligations of the Participation Agreement are satisfied, Participant must respond to all communications and requests from OSRHE within the time indicated.
- C. Until all mutual obligations of the Participation Agreement are satisfied, Participant must provide written notification to OSRHE of any change in legal name or address or of any change in status, which affects TSEIP eligibility.

*Approved by the State Regents on March 30, 2001. Amended June 29, 2001 and September 14, 2001.
Permanent Rule amended effective May 11, 2006, revised November 29, 2007.*

5.15 TULSA RECONCILIATION EDUCATION AND SCHOLARSHIP ACT

Administrative Rule Title 610 Chapter 25 Subchapter 29 (610:25-29)

5.15.1 Purpose (610:25-29-1)

- A. The Tulsa Reconciliation Education and Scholarship Program was established by HB 1178, the “1921 Tulsa Race Riot Reconciliation Act of 2001”, which was signed into law on June 1st 2001. The Act was amended by HB 2238 of the 2002 legislative session.
- B. The purpose of the program is to make available a maximum of 300 scholarships to residents of the Tulsa School District, which was greatly impacted both socially and economically by the civil unrest that occurred in the city during 1921. The program is to begin with the 2002-03 school year or as soon thereafter as practicable, subject to the availability of funds.
- C. *The further purpose of the program is to establish and maintain a variety of educational support services whereby residents who qualify for the program will be prepared for success in postsecondary endeavors. [70 O.S. §2621]*

5.15.2 Definitions (610:25-29-2)

The following words or terms, when used in this Subchapter, shall have the following meaning, unless the concept clearly indicates otherwise:

“Postsecondary career technology education program” *means a postsecondary vocational-technical program or course that is eligible for Title IV federal student aid and is offered through a technology center school. [70 O.S. §2622]*

“Private Institution”, *means a private institution of higher learning located within this state which is accredited pursuant to Section 4103 of Title 70 of the Oklahoma Statutes. [70 O.S. §2622]*

“Resident”, *means a person of any age who has resided within the Tulsa School District, for not less than two (2) years prior to applying for participation in the Tulsa Reconciliation Education and Scholarship Program. [70 O.S. §2622]*

5.15.3 Eligibility requirements (610:25-29-3)

- A. General eligibility requirements. To be eligible to participate in the Program, individuals must be residents of the Tulsa School District who are intending to pursue studies at an institution of higher education in the Oklahoma State System of Higher Education, a private institution or in a postsecondary career technology education program.
- B. Additional eligibility requirements.
 - 1. Individuals must have secured admission to, and be enrolled in, an institution which is a member of the Oklahoma State System of Higher Education, a private institution of higher education, or a post-secondary

career technology education program, and must have secured such admission by regular admission standards. Participants may not be admitted by special admission standards.

2. To retain eligibility, individuals must maintain good academic standing at the institution in which the student is enrolled.

C. High school scholarship eligibility requirements. The State Regents may also annually award scholarships to a maximum of two graduating students from each high school in the Tulsa School District for the purpose of *preserving awareness of the history and meaning of the civil unrest that occurred in Tulsa in 1921. The State Regents shall involve the administration of the Tulsa School District in the selection process.* [70 O.S. §2623] Eligibility requirements for the high school scholarships shall include:

1. *enrollment in the appropriate high school,*
2. *family income of the applicant from taxable sources not to exceed Seventy Thousand Dollars (\$70,000.00) per year.*
3. satisfaction of the criteria in paragraph B of this section.

5.15.4 Principles for awards, continuation of awards, disbursements, refunds, and applications

- A. Award amounts. Subject to the availability of funds, the State Regents shall award:
1. For participants enrolled in an institution in the Oklahoma State System of Higher Education, an amount not to exceed the equivalent of the average dollar amount of undergraduate resident tuition that the eligible Program participant is obligated to pay.
 2. For participants enrolled in a private institution of higher education, an amount not to exceed the equivalent of the average dollar amount of undergraduate resident tuition that the eligible Program participant would receive if enrolled in a school within the Oklahoma State System of Higher Education.
 3. For participants enrolled in a postsecondary career technology education program, an amount not to exceed the equivalent of the dollar amount that the eligible program participant is obligated to pay, which amount shall not exceed the amount the participant would have received for comparable enrollment at a two-year institution within the Oklahoma State System of Higher Education. An award to an eligible participant who is enrolled in a postsecondary vocational-technical program may be used to pay for both vocational-

technical and college work if both are required by the academic program.

- B. Award limitations. (610:25-29-4)
1. Program benefits will not be awarded for courses or other postsecondary units taken by the participant:
 - a. That are in excess of the requirements for completion of a baccalaureate program.
 - b. That are taken more than five (5) years after the student's first semester of participation in the program, except in hardship circumstances as determined by the State Regents. Even when such a hardship is found to exist, in no event shall the participant receive benefits after the participant has been enrolled for a five (5) year cumulative time period.
 2. Program benefits shall be awarded to *not more than 300 eligible participants annually, subject to the amount of funds available for the program and the number of eligible participants.* [70 O.S. §2625(E)]
 3. If sufficient funds to provide awards to the maximum number of eligible participants are not available, the State Regents shall make awards based upon need.
 - a. For all academic years, participants who have previously received awards shall be given an absolute priority for continued financial support by the Program, superior to any residents who are applying for such benefits for the first time.
 - b. Thereafter, the order of preference of the applicants for awards based upon need shall be determined by the State Regents using the following factors:
 - i. *the family income of the applicant from taxable sources is not more than Seventy Thousand Dollars (\$70,000.00 per year),*
 - ii. *the applicant attended a Tulsa public school where seventy-five percent (75%) or more of the students enrolled in school qualify for the free and reduced lunch program, and*
 - iii. *the applicant resides in a census block area within the Tulsa School District where thirty percent (30%) or more of the residents are at or below the poverty level established by the United States Bureau of the Census.* [70 O.S. §2623]

- c. When the factors listed above prove inadequate to narrow the pool of applicants sufficiently, the State Regents may consider, as an additional order of preference factor, whether the applicant is a direct lineal descendant of a person who resided in the Greenwood Area in the City of Tulsa between April 30, 1921 and June 1, 1921.
 - i. Except for the absolute priority given to eligible participants who have already received an award(s) under the Program, this factor shall be applied to all applicants regardless of race when utilized by the State Regents.
 - ii. The Oklahoma Historical Society shall verify all applicant claims of lineal descent.
 - d. When making awards, the State Regents shall take other grants and scholarships received by the eligible participant into consideration. In such cases, the Program benefit may be used to cover additional educational costs not covered by the other grants and scholarships.
- 4. The award for the high school scholarships *shall be limited to a one-year full-time-equivalent period. Following successful completion of such award, recipients who meet the criteria provided in 5.15.4 (B)(3)(b) shall be eligible to apply and be considered for continued participation in the full Tulsa Reconciliation Education and Scholarship Program. Any student subsequently awarded such scholarship shall have the duration of the high school scholarship deducted from five-year limit on scholarship eligibility.* [70 O.S. 2623]
- C. Disbursement. Funds will be disbursed from the Tulsa Reconciliation Education and Scholarship Trust Fund to the institution at which the student is enrolled. The high school scholarship award *may only be funded with state funds appropriated to the Tulsa Reconciliation Education and Scholarship Trust Fund and income therefrom, and shall be made subject to the availability of such funds.* [70 O.S. 2623]
- D. Refunds. Refunds resulting from student withdrawal will be remitted to the State Regents.
- E. Application.
 - 1. Students must fully complete an application form provided by the State Regents.
 - 2. Applications will be processed by the State Regents according to deadlines established annually.

3. Any falsified or incomplete information on the application form may result in disqualification from the Program.

5.15.5 Trust funds (610:25-29-5)

- A. The Oklahoma State Regents for Higher Education will serve as the Board of Trustees for the Tulsa Reconciliation Education and Scholarship Trust Fund. The Board will invest the trust corpus in a reasonable and prudent manner, subject to further limitations and safeguards provided in existing, applicable State Regents' investment policies.
- B. *The Trust Fund capital shall consist of monies the Legislature appropriates or transfers to the Oklahoma State Regents for Higher Education for the Trust Fund, monies transferred from donations from taxpayers pursuant to Section 2627 of Title 70, and any monies or assets contributed to the Trust Fund from any other source, public or private. [70 O.S. §2626©]*
- C. Both the trust capital and earnings income for the trust funds will accrue to the fund and may be used only for the scholarship awards.
- D. The State Regents may, at the time an award is made on behalf of a Tulsa Reconciliation Education and Scholarship Program participant, set aside in the Trust Fund funds for the full commitment made to such participant.

Administrative rule effective May 28, 2002. Amended effective July 25, 2003.

5.16 OKLAHOMA TUITION EQUALIZATION GRANT

Administrative Rule Title 610 Chapter 25 Subchapter 31 (610:25-31)

5.16.1 Purpose (610:25-31-1)

- A. The Oklahoma Tuition Equalization Grant was established by SB 520, creating the Oklahoma Tuition Equalization Grant Act of 2003, which was signed into law on May 12, 2003.
- B. The purpose of this program is to provide grant assistance to Oklahoma residents enrolled as undergraduate students in a private or independent institution of higher education in Oklahoma.

5.16.2 Definitions (610:25-31-2)

The following words or terms, when used in this Subchapter, shall have the following meaning, unless the concept clearly indicates otherwise:

“Private or Independent Institution”, means an institution of higher learning that is not a public institution within the Oklahoma State System of Higher Education. The institution must be a not-for-profit entity, domiciled within Oklahoma, accredited by the Oklahoma State Regents for Higher Education, and fully accredited by the Higher Learning Commission of the North Central Association of Colleges and Schools or a national accrediting body recognized by the United States Department of Education. [70 O.S. §2632])

5.16.3 Eligibility Requirements (610:25-31-3)

To be eligible for the Oklahoma Tuition Equalization Grant, an applicant shall:

1. Be an Oklahoma resident.
2. Have enrolled full-time as an undergraduate at an eligible private or independent institution. For regular fall and spring semesters, full-time enrollment shall be considered a minimum of 12 semester credit hours or its equivalent.
3. Meet the family income eligibility level of less than \$50,000 from both taxable and non-taxable sources for the most recently completed calendar/tax year.
4. Pay more tuition than is required at a comparable public institution of higher education.
5. Maintain the minimum standard of academic performance as required by the enrolling private or independent institution.

5.16.4 Fiscal Policies (610:25-31-4)

- A. The enrolling private or independent institution shall forward a completed student application, documentation of full-time enrollment status, and certification of resident status to the State Regents no later than October 15 for the fall semester and March

15 for the spring semester of each academic year.

- B. Subject to the availability of funds in the Oklahoma Tuition Equalization Grant Trust Fund, an applicant is eligible to receive an award up to \$2,000 per academic year, or \$1,000 per academic semester.
- C. Students receiving this grant may also receive additional state-supported financial aid, but not in excess of the student's cost of attendance as determined by the institution consistent with regulations for federal financial aid.
- D. Grants are not approved for summer or intersession enrollments.
- E. A student may be awarded a grant for a period of five (5) consecutive years of study in a baccalaureate program beginning when the student first receives the grant, or until the student is granted a baccalaureate degree, whichever occurs first. Exceptions to this requirement may be considered for hardship circumstances; however, no recipient may receive benefits beyond a cumulative period of five (5) years.
- F. If funds are not sufficient in the Oklahoma Tuition Equalization Grant Trust Fund to provide grants for all eligible applicants, the State Regents shall award grants on the basis of need. If necessary, the private or independent institution shall provide to the State Regents the Expect Family Contribution (EFC) calculated for each eligible student for federal financial aid purposes. Institutions may also be required to provide the amount of unmet financial need calculated for each student's financial aid package. Students who have previously received a grant and who continue to meet the requirements for eligibility shall have absolute priority over any student who is applying for a grant for the first time.

5.16.5 Refunds and institutional liability

Institutions will report to the Oklahoma State Regents for Higher Education any awards that the institution is aware are based on inaccurate application data. If funds have been disbursed to a student, and the student reported incorrect data unknown to the institution at the time of eligibility certification, the student is responsible for the return of any funds for which he/she is not eligible to receive. All refunds will be coordinated by the institution for return to the Oklahoma State Regents for Higher Education. The institution will place holds as allowed on other financial aid disbursements, future enrollments, release of transcripts, etc. in an effort to collect refunds if necessary. In the event Oklahoma Tuition Equalization Grant funds are disbursed to a student as a result of erroneous action by the institution, the institution is financially liable for the return of the ineligible funds. An institution's failure to submit refunds for which the institution is liable within a reasonable period of time could result in suspension or termination of the institution's eligibility for participation in the Oklahoma Tuition Equalization Grant program. Thirty days is considered to be a reasonable

period of time. The institution may appeal a finding of institutional liability.

Administrative Rule Effective May 27, 2004. Amended May 25, 2009

5.17 OKLAHOMA TUITION AID GRANT PROGRAM

5.17.1 Program purpose (610:25-7-1)

- A. The purpose of the Oklahoma Tuition Aid Grant Program is to provide need-based grant assistance to eligible Oklahoma resident students and to serve the state's most needy students in a fair and equitable fashion using funds made available pursuant to the Oklahoma Higher Education Tuition Aid Act and in conjunction with the Leveraging Educational Assistance Partnership Program administered by the U.S. Department of Education.
- B. The Oklahoma Tuition Aid Grant Program was established to assist Oklahoma college students with demonstrated financial need to meet the cost of attendance at postsecondary institutions in Oklahoma through reimbursement of a portion of their costs of attendance. Congress amended the Higher Education Act of 1965 to provide incentive grants to states for the implementation or expansion of state grant programs. Accordingly, the purpose of the Leveraging Educational Assistance Partnership Program (LEAP) is to provide matching funds to encourage operation of state grant programs to improve student access and choice in higher education. States pay all administrative costs and match federal allotment dollars from non-federal resources. Funds not used by one state may be reallocated to others in proportion to their higher education enrollments.

5.17.2 Legislative authority (610:25-7-2)

- A. **Federal.** Leveraging Educational Assistance Partnership Program is authorized under Title IV, Part A, Subpart 3 of the Higher Education Act of 1965, as added by P.L. 92-318, and amended by P.L. 94-482, P.L. 95-43, P.L. 95-566, P.L. 95-96, P.L. 96-374, P.L. 97-35, and P.L. 105-244.
- B. **State.** The 1971 Oklahoma Legislature enacted Senate Bill No. 191 authorizing the establishment of a Tuition Aid Grant Program to be administered by the Oklahoma State Regents for Higher Education. Senate Bill No. 400 of the 1982 Legislature amended O.S. 1981, Title 70, Sections 626.1 through 626.10 related to tuition aid grants. Senate Bill No. 770 of the 1990 Legislature amended O.S. 1981, Title 70, Section 626.2 related to tuition aid grants and Section 626.7 related to student eligibility qualifications and amount of grant. House Bill No. 1075 of the 1995 Legislature amended O.S. 1991, Title 70, Section 626.6 related to student eligibility qualifications. Senate Bill No. 196 of the 1999 Legislature amended O.S. 1991, Title 70, Sections 626.4 and 626.7 related to student eligibility requirements and the awarding of grants.

5.17.3 Administration of grants and payments (610:25-7-3)

There are hereby created state tuition aid grants which shall be maintained by the state, awarded and administered pursuant to the Oklahoma Higher Education Tuition Aid Act [70 O.S., § 626.1 et seq.], and used by the holders thereof for study in nonprofit, accredited institutions of higher education in Oklahoma. [70 O.S., § 626.2]

5.17.4 Maximum limitations (610:25-7-4)

A. State tuition aid grants shall be awarded to all eligible applicants without any limitation on the number to be awarded in any year other than the amount of appropriations available therefore. The institution involved may appropriately schedule work to permit recipients to earn the amount of said tuition grants. [70 O.S., § 626.4]

5.17.5 Non-discrimination provision (610:25-7-5)

A. State tuition aid grants shall be awarded without regard to race, religion, creed, or sex. [70 O.S., § 626.5]

5.17.6 Eligibility; amount of grant; application procedures and deadlines; disbursement of funds (610:25-7-6)

A. *A college tuition aid grant shall be awarded annually to each eligible, qualified full-time or part-time undergraduate or graduate student enrolled in a curriculum leading to a degree or certificate in an institution of collegiate grade or postsecondary institution providing a program of training to prepare students for employment in a recognized occupation in Oklahoma approved or accredited by the Oklahoma State Regents for Higher Education or appropriate postsecondary agency in accordance with the following [70 O.S., § 626.7]:*

1. Eligibility.

- a. Each full-time or part-time resident student's financial eligibility will be based on their Expected Family Contribution (EFC) calculated for federal Title IV student financial aid eligibility. A resident student is one who meets the current Policy on Residence Status of Enrolled Students in the Oklahoma State System of Higher Education. Full-time and part-time status will be defined in accordance with the current definition for full-time or half-time enrollment status for federal Title IV student financial aid eligibility.
- b. The Oklahoma State Regents for Higher Education shall determine by rules and regulations the maximum number of semesters a student may be eligible for grants. [70 O.S., § 626.7] An otherwise eligible undergraduate

student can continue to receive awards as long as they are eligible for funding from the federal Pell grant program. Graduate students can receive a maximum of eight full-time disbursements.

- c. No student shall be eligible for grants unless he maintains such minimum standards of academic performance as are required by the institution in which the student is enrolled. [70 O.S., § 626.7] The minimum standards of academic performance shall be those required by the institution for federal Title IV financial aid recipients.
 - d. Students who are incarcerated are not eligible to receive tuition aid grants. Incarceration will be defined in accordance with the current definition for federal Pell grant eligibility.
 - e. Students must be enrolled in a postsecondary institution eligible to participate in the federal Title IV student financial aid programs.
 - f. Students must meet all general eligibility requirements for recipients of federal Title IV student financial aid. The school of attendance will report each student's completed application status through a reporting system provided by the Oklahoma State Regents for Higher Education.
 - g. In the event a student for any reason ceases to continue to be enrolled during the course of an academic year, the student shall cease to be eligible for tuition aid. [70 O.S., § 626.7]
2. Amount of grant.
- a. The amount of tuition aid grant to any student under this act [70 O.S., § 626.1 et seq.] for any semester shall represent a percentage not greater than seventy-five percent (75%) of the previous year's tuition and enrollment fees normally charged to residents of the State of Oklahoma by the institution of attendance. [70 O.S., § 626.7] The tuition and enrollment fees used in calculating the award will be based on standards as follows: full-time undergraduate - 30 credit hours per academic year; part-time undergraduate and graduate - 12 credit hours per academic year; full-time graduate - 18 credit hours per academic year; full-time career technology - at least 900 clock hours; and part-

time career technology - at least 450 clock hours. If the Oklahoma State Regents for Higher Education determine that funds are available to offer awards for summer enrollments, institutions will be notified. At the time of the notification, summer award amounts will be announced.

- b. The percentage of aid awarded shall be based on a need analysis system that is consistent with federal student financial aid regulations. [70 O.S., § 626.7] The percentage of aid awarded shall be based on the student's Expected Family Contribution (EFC) calculated for federal Title IV student financial aid eligibility. The Oklahoma State Regents for Higher Education will issue an annual award payment schedule identifying the maximum eligible EFC and identifying the percentage of aid to be awarded according to EFC ranges.
 - c. The Oklahoma State Regents for Higher Education shall determine by rules the annual maximum award based on an annual assessment of funds availability. The State Regents shall not increase the annual maximum award amount unless funding is sufficient to serve at least the same number of students as the previous academic year. [70 O.S., § 626.7]
 - d. The minimum amount of grant to be awarded is \$200 per academic year or \$100 per semester.
 - e. The award must be included in the student's financial aid package managed by the institution. If the inclusion of the tuition aid grant award results in the student receiving more financial assistance than is needed to meet their cost of education as determined by the institution, the institution will resolve the over award in accordance with federal Title IV student financial aid regulations. The institution may reduce or revoke the award if necessary to resolve the overaward.
3. **Application procedures and deadlines.** The Oklahoma State Regents for Higher Education may adopt rules and regulations, prescribe and provide appropriate forms for application and employ such persons, contract for such services and make such additional expenditures as may be necessary or appropriate for effectuating the provisions of this act. [70 O.S., § 626.7]
- a. Students will apply for tuition aid grant award

consideration by completing the federal student financial aid application. A separate application may be provided for students eligible for state financial aid under 70 O.S., § 3242. The Oklahoma State Regents for Higher Education will receive application data from the federal Title IV student financial aid application system for those students who indicate their legal state of residence is Oklahoma. Applications with at least one eligible Oklahoma institution selected by the student will be processed for tuition aid grant award consideration.

- b. The application receipt deadline will be reflected in the application document provided annually by the federal Title IV student financial aid application system.

4. Disbursement of funds.

- a. Funds will be disbursed to students after the institution confirms enrollment status and eligibility in each the fall and spring semesters. One half of the award will be disbursed in the fall semester, and one half of the award will be disbursed in the spring semester.
- b. Funds for eligible students will be delivered to the institution for disbursement to students in accordance with the institution's student financial aid disbursement policies.

- B. The Oklahoma State Regents for Higher Education are hereby authorized to determine priorities for participation in this tuition aid program by full-time, part-time, undergraduate and graduate students based on available state funding. [70 O.S., § 626.8]

5.17.7 Grant program not to influence institution's policies (610:25-7-7)

- A. This act [70 O.S., § 626.1 et seq.] shall not be construed as granting any authority to control or influence the policies of any educational institution because it accepts students receiving tuition aid grants, nor to require any such institution to admit or once admitted to continue in such institution any tuition aid recipient. [70 O.S., § 626.9]

5.17.8 Funding (610:25-7-8)

- A. It is the intent of the Oklahoma Legislature that the provisions of this act [70 O.S., § 626.1 et seq.] become effective only after funding for this purpose has been provided through special appropriations, or funding is otherwise provided by gifts or grants for this purpose or both. [70 O.S., § 626.10]

5.17.9 Authorized institutional representative (610:25-7-9)

- A. Each institution's president or chief administrator may designate

one or more bonded staff members as authorized officials to make certifications as to the eligibility of tuition aid grant applicants, to verify enrollments and attendance, to receive and disburse funds, and to perform such other duties as may be necessary for the proper administration of tuition aid grant funds. A signed Authorized Institutional Representative form must be on file in the offices of the Oklahoma State Regents for Higher Education for each authorized official.

5.17.10 Refunds and institutional liability (610:25-7-10)

- A. An authorized institutional representative will report to the Oklahoma State Regents for Higher Education any awards that the institution is aware are based on inaccurate application data. If funds have been disbursed to a student, and the student reported incorrect data unknown to the institution at the time of eligibility certification, the student is responsible for the return of any funds for which he/she is not eligible to receive. All refunds will be coordinated by the institution for return to the Oklahoma State Regents for Higher Education. The institution will place holds as allowed on other financial aid disbursements, future enrollments, release of transcripts, etc. in an effort to collect refunds if necessary. In the event tuition aid grant funds are disbursed to a student as a result of erroneous action by the institution, the institution is financially liable for the return of the ineligible funds. An institution's failure to submit refunds for which the institution is liable within a reasonable period of time could result in suspension or termination of the institution's eligibility for participation in the tuition aid grant program. Thirty days is considered to be a reasonable period of time. The institution may appeal a finding of institutional liability.

Adopted June 26, 1989, Revised February 18, 2000, Permanent Rule amended effective July 13, 2000, last amended effective July 11, 2008.

5.18 BRAD HENRY INTERNATIONAL SCHOLARSHIP PROGRAM

5.18.1 Purpose

The purpose of the Brad Henry International Scholarship Program is to provide an opportunity to undergraduate students from Oklahoma regional universities to participate in a semester of study abroad at the University of Wales in Swansea (Swansea University). The scholarship may be used to cover the cost of tuition, fees, room and board, books, materials, and travel expenses relating to the study abroad program.

5.18.2 General Provisions

- A. Each regional university will have an opportunity to nominate one student each academic year for participation in the Brad Henry International Scholarship Program. Nominations must be made by the university president.
- B. Recipients will be selected from the available nominations by a committee of State Regents' staff. Recipients selected for this award will have shown:
 - 1. excellent academic performance
 - 2. outstanding writing and communication skills
 - 3. exemplary character
 - 4. exceptional leadership, maturity and judgment
- C. Academic credit for courses taken as a part of the Brad Henry International Scholarship Program will be awarded as resident credit by the Oklahoma regional university. Credit for this program must be coordinated with the Oklahoma regional university prior to the beginning of the semester of study abroad.

5.18.3 Eligibility Requirements

- A. Brad Henry International Scholar shall meet the following criteria:
 - 1. an undergraduate student from an Oklahoma regional university
 - 2. an Oklahoma resident
 - 3. be enrolled full-time
 - 4. be in good academic standing
 - 5. have completed at least 30 hours of college coursework/credits

5.18.4 Fiscal Aspects of the Program

- A. Funds made available to the student as part of the Brad Henry International Scholarship Program shall be paid directly to the regional university in which the student is enrolled, in trust for

the student and on behalf of the student. Swansea University will invoice the regional university for the cost of tuition, fees, room and board, to be paid from the recipient's award amount. Upon payment of these costs, the regional university will distribute the remainder of the award to the recipient.

B.

C. The program shall provide recipients a scholarship in an amount not to exceed the average costs of Swansea University tuition, fees, room and board, required textbooks and materials, and travel expenses relating to the study abroad program.

D.

E. The number and amount of scholarship awards will be determined by the amount of funds allocated to the program each year.

Adopted June 21, 2012.

