

Tab F – Paying For College



UTAH SYSTEM OF
HIGHER EDUCATION

Building a Stronger State of Minds

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PAYING FOR COLLEGE

This tab contains information on student financial aid programs in the Utah System of Higher Education (USHE). Similar programs are grouped together in different sections of the report:

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- II. Federal Campus-Based Student Financial Aid
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- IV. Statutory Tuition Waivers
- V. Tuition Set Asides for Need-Based Financial Aid

I. STATE STUDENT FINANCIAL ACCESS PROGRAMS

INTRODUCTION

The following tables provide statistical information for two state-sponsored programs administered by the Utah Higher Education Assistance Authority: the Utah Educational Savings Plan Trust (UESP) and the Higher Education Success Stipend Program (HESSP)—formerly UCOPE, described in further detail below.

UTAH EDUCATIONAL SAVINGS PLAN TRUST (UESP)

About UESP

The Utah Educational Savings Plan (UESP) is a nonprofit 529 college savings plan, authorized by the Utah State Legislature in 1996 and designed to comply with Section 529 of the Internal Revenue Code. UESP is the official and only 529 plan sponsored by the State of Utah. It is administered and managed by the Utah State Board of Regents and the Utah Higher Education Assistance Authority (UHEAA) board.



As a direct-sold college savings plan, UESP is dedicated to helping families save for college. UESP does not sell account owners additional products or services, such as retirement plans or insurance.

Tax Advantages

- Earnings on investments in UESP accounts grow tax-deferred from federal and Utah state income taxes, and withdrawals are tax-exempt when used for qualified higher education expenses.
- Utah taxpayer account owners and trusts may claim a 5 percent Utah state income tax credit each year for contributions to their accounts up to certain limits *per qualified beneficiary*. Utah corporations may deduct contributions to their UESP accounts up to a certain limit *per qualified beneficiary*. For an account owner to be eligible for the Utah state income tax credit or deduction, the beneficiary of the UESP account must be designated as such before age 19.

Use of Funds

- Money in a UESP account may be used for a beneficiary's qualified higher education expenses, including tuition and fees; required books, supplies, and equipment; computers, related equipment and software, and internet access; and certain room-and-board costs.
- The funds may be used at any accredited technical school, college, or university that participates in federal financial aid programs for students in the United States or abroad, not just at institutions in Utah. Visit fafsa.ed.gov for a list of eligible schools.

Flexibility

- UESP requires no minimum or ongoing contributions to open an account. An account owner/agent may open an account with a zero balance and start saving when he or she chooses.
- A beneficiary may be anyone, of any age, with a valid U.S. Social Security or Taxpayer Identification Number.
- A beneficiary may be changed at any time to another member of the beneficiary's family. Please note: If the beneficiary is changed from someone younger than age 19 to someone who is age 19 or older, the account owner must recapture (add back) Utah state income tax credits or deductions claimed in any prior tax year.
- UESP allows the account owner/agent to be changed at any time, as long as the account owner/agent is at least age 18 and has a valid U.S. Social Security or Taxpayer Identification Number.

Investment Options

An account owner/agent may choose from 14 investment options UESP offers:

- Four age-based investment options
- Eight static investment options
- Two customized investment options

With a low average asset-weighted fee, UESP is a low-cost leader in the 529 plan industry. UESP charges no fees to Utah residents who select the Public Treasurers' Investment Fund investment option. For more information about UESP or to request a copy of the Program Description, visit uesp.org, call 800.418.2551 toll-free, or send an email to info@uesp.org.

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Read the Program Description for more information and consider all investment objectives, risks, charges, and expenses before investing. Call 800.418.2551 for a copy of the Program Description or visit uesp.org.

Investments in UESP are not guaranteed by UESP, the Utah State Board of Regents, the Utah Higher Education Assistance Authority (UHEAA) or any other state or federal agency. However, Federal Deposit Insurance Corporation (FDIC) insurance is provided for the FDIC-insured accounts. Please read the Program Description to learn about the FDIC-insured accounts. Your investment could lose value.

Non-Utah taxpayers and residents: You should determine whether the state in which you or your beneficiary pays taxes or lives offers a 529 plan that provides state tax or other benefits not otherwise available to you by investing in UESP. You should consider such state tax treatment and benefits, if any, before investing in UESP.

UESP does not provide legal, financial, investment, or tax advice, and the information provided in this document does not contain legal, financial, investment, or tax advice and cannot be construed as such or relied upon for those purposes. You should consult your own tax or legal advisor to determine the effect of federal and state tax laws on your particular situation.

HIGHER EDUCATION SUCCESS STIPEND PROGRAM (HESSP)

HESSP (formerly UCOPE) is a state supplement grant and work-study assistance award established by the Utah State Legislature. Program funds may be used for either grants or work-study awards to Utah resident students with demonstrated financial need, using the federal needs analysis methodology. HESSP funds are allotted to participating eligible institutions based on population of resident students with high financial need as evidenced by award of Federal Pell Grants. In addition to USHE institutions, Brigham Young University, Westminster College, LDS Business College, and the UCAT campuses participate in the HESSP Program.

VETERANS TUITION GAP PROGRAM (VET GAP)

VeT Gap is a state supplement grant to provide tuition assistance for veterans who are recipients of Federal Post-9/11 Veterans Educational Assistance Act (federal program) benefits who are attending institutions of higher education in Utah and whose benefits under the federal program have been exhausted. This program is only available to higher education institutions that grant baccalaureate degrees. Eligible Veterans must be in the last year of their first baccalaureate degree program. Awards can be up to the cost of tuition only. Allocations are based on the number of Veterans (using post-9/11 benefits) a participating school has graduated in the last year as a ratio to the total for all participating schools.

Table 1

Utah Education Savings Plan Trust (UESP)
Number of Accounts and Total Assets by Fiscal Year

Fiscal Year Ending June 30	Number of Accounts	Total Assets (in thousands)
2001	7,800	\$42,000
2002	23,600	\$218,000
2003	35,900	\$431,000
2004	45,600	\$474,000
2005	59,700	\$1,098,000
2006	76,700	\$1,535,000
2007	98,400	\$2,286,000
2008	126,300	\$2,568,000
2009	142,900	\$2,413,000
2010	162,300	\$3,095,000
2011	182,200	\$4,197,000
2012	203,300	\$4,694,000
2013	226,100	\$5,843,000
2014	257,400	\$7,433,000
2015	287,900	\$8,357,000
2016	314,716	\$9,132,000

Table 2

Higher Education Success Stipend Program (HESSP)
Fiscal Year Ending June 30, 2016

Institution	Grant Award		Work Study Award		Administrative Expense	Total Expended
	#	\$	#	\$	\$	\$
U of U	432	320,682	0	0	9,918	330,600
USU	165	109,500	186	233,499	10,578	353,577
WSU	250	300,200	0	0	0	300,200
SUU	149	54,021	44	26,859	0	80,880
SNOW	94	44,816	13	10,422	2,262	57,500
DSU	86	53,884	41	113,444	5,172	172,500
UVU	629	475,009	0	0	14,691	489,700
SLCC	488	397,208	0	0	0	397,208
TOTAL USHE	2,293	\$ 1,755,320	284	\$ 384,224	\$ 42,621	\$ 2,182,165
BYU	89	161,031	0	0	0	161,031
LDSBC	24	9,400	0	0	0	9,400
WESTMINSTER	9	20,900	0	0	0	20,900
WGU	35	65,100	0	0	0	65,100
TOTAL PRIVATE	157	\$ 256,431	0	\$ -	\$ -	\$ 191,331
UCAT	134	49,852	0	-	498	50,350
FINAL TOTALS	2,584	\$ 2,061,603	284	\$ 384,224	\$ 43,119	\$ 2,423,846

Notes:

Veteran Tuition Grant Program (VeT Gap)
Fiscal Year Ending June 30, 2016

Institution	Awards		Administrative Expense	Total Expended
	#	\$	\$	\$
University of Utah	1	978	189	1,167
Utah State University	1	2,789		2,789
Weber State University	7	19,291	3,756	23,047
Southern Utah University	1	2,809	483	3,292
Dixie State University	5	10,514		10,514
Utah Valley University	9	13,820		13,820
TOTAL USHE	24	\$ 50,201	\$ 4,428	\$ 54,629
Park University	1	930		930
Western Governors University	2	3,500		3,500
Westminster College	2	7,700		7,700
TOTAL PRIVATE NOT-FOR-PROFIT	4	\$ 12,130	\$ -	\$ 12,130
Art Institute of Salt Lake City	9	11,196	0	11,196
TOTAL FOR-PROFIT	9	\$ 11,196	\$ -	\$ 11,196
FINAL TOTALS	37	\$ 73,527	\$ 4,428	\$ 77,955

Notes:

(1) VeT Gap data is compiled from annual reports provided by the participating institutions for the 2015 award year.

II. FEDERAL CAMPUS-BASED STUDENT FINANCIAL AID

INTRODUCTION

The following tables provide statistical information concerning a number of federally-supported student financial aid programs. These programs all are campus-based, as operated in Utah. Awards under all four programs are required to be based on demonstrated financial need. Annual state appropriations to the Board of Regents provide part of the required matching funds for the Federal Work Study (FWS) Program, and all required matching funds for the other two programs (Pell Grants do not require matching funds) for USHE institutions.

FEDERAL PERKINS LOANS

The Federal Perkins Loan Program provides low interest (five percent) loans with a maximum 10 year repayment period to students with exceptional financial need. The matching requirement in this program is 25 percent of the capital contributions to the institutional loan fund. *Congress has not funded the Perkins Loan Program since Fiscal Year 2006; however institutions continue to disburse program funds from prior year contributions.*

FEDERAL WORK-STUDY (FWS)

The FWS Program provides jobs for financially needy undergraduate and graduate students who qualify for financial aid. Employers pay a portion of the students' wages while the FWS funds pay the remainder. Funding for the FWS Program is received directly from the U.S. Department of Education (ED). Institutions are required to provide an annual match representing 25 percent of total FWS funds.

FEDERAL PELL GRANTS

The Federal Pell Grant Program is the largest federal student financial aid grant program. Federal Pell Grants are need-based awards to undergraduate students. Eligibility for Pell Grants is limited to students with the *greatest* financial need. Funding for the Federal Pell Grant Program comes directly from ED to the individual campuses. The Pell Grant Program is provided to every eligible applicant. For the 2016-2017 award year the maximum grant amount is scheduled at \$5,815.

FEDERAL SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANTS (FSEOG)

The FSEOG Program is a grant program for undergraduate students with exceptional need. Awards of up to \$4,000 per year are available depending on the student's need and availability of funds. Funding for the program is provided by ED. The state matching requirement is 33 percent of federal funds (25 percent of total funds).

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2006-07		2007-08		2008-09		2009-2010		2010-11	
	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount
UU Perkins Loan	2,271	\$6,360,511	971	\$2,806,430	1,089	\$2,518,406	1,485	\$3,273,659	1,342	\$3,056,533
FWS	429	\$1,442,092	441	\$1,508,949	390	\$1,263,064	447	\$1,617,816	425	\$1,442,206
FSEOG	1,533	\$888,947	1,691	\$889,880	3,006	\$1,078,773	1,607	\$1,172,474	1,302	\$970,204
LEAP	1,131	\$417,700	1,206	\$421,280	1,206	\$421,280	583	\$406,620	574	\$411,600
Pell	5,370	\$12,737,927	5,010	\$12,228,721	4,882	\$13,663,216	6,204	\$21,110,783	7,986	\$30,596,971
TOTAL		\$21,847,177		\$17,855,260		\$18,944,739		\$27,581,352		\$36,477,514
USU Perkins Loan	844	\$2,198,492	870	\$2,313,153	319	\$873,418	434	\$1,181,471	797	\$2,153,545
FWS	374	\$922,920	595	\$1,349,830	698	\$1,728,761	594	\$1,601,487	407	\$1,091,096
FSEOG	1,123	\$815,777	1,063	\$871,244	1,023	\$854,960	1,041	\$828,376	2,442	\$826,261
LEAP	391	\$318,000	341	\$301,500	313	\$275,800	328	\$304,000	393	\$308,000
Pell	5,872	\$14,246,824	5,727	\$14,902,741	5,798	\$17,188,871	7,358	\$27,028,704	8,816	\$33,286,071
TOTAL		\$18,502,013		\$19,738,468		\$20,921,810		\$30,944,038		\$37,664,973
WSU Perkins Loan	457	\$1,437,836	309	\$1,003,962	509	\$1,622,388	444	\$1,405,161	356	\$1,016,561
FWS	198	\$535,376	202	\$543,628	317	\$799,795	448	\$1,258,640	261	\$836,390
FSEOG	999	\$828,542	770	\$885,005	1,072	\$946,562	659	\$566,285	669	\$590,858
LEAP	315	\$264,100	227	\$253,400	262	\$225,200	312	\$244,500	270	\$247,400
Pell	4,708	\$10,657,295	4,483	\$10,491,219	4,654	\$12,174,809	6,404	\$21,823,012	8,143	\$29,042,257
TOTAL		\$13,723,149		\$13,177,214		\$15,768,754		\$25,297,598		\$31,733,466
SUU Perkins Loan	140	\$455,793	149	\$441,058	62	\$186,911	75	\$195,938	87	\$268,826
FWS	313	\$284,350	293	\$284,347	232	\$284,371	236	\$284,348	212	\$284,348
FSEOG	961	\$195,348	816	\$195,348	603	\$194,998	570	\$185,448	499	\$195,348
LEAP	213	\$102,200	160	\$99,800	172	\$91,200	130	\$90,672	199	\$109,700
Pell	2,329	\$5,961,928	2,157	\$5,869,114	2,265	\$7,029,574	2,952	\$11,734,843	3,499	\$14,188,315
TOTAL		\$6,999,619		\$6,889,667		\$7,787,054		\$12,491,249		\$15,046,537
SNOW Perkins Loan	2	\$4,500	0	\$0	0	\$0	0	\$0	0	\$0
FWS	136	\$128,078	121	\$118,121	119	\$127,613	114	\$124,718	87	\$110,835
FSEOG	412	\$109,524	319	\$121,701	314	\$109,524	301	\$109,524	338	\$109,524
LEAP	133	\$51,800	152	\$50,700	108	\$45,400	154	\$47,000	141	\$47,740
Pell	934	\$2,281,370	800	\$2,021,773	863	\$2,436,725	1,276	\$4,658,083	1,607	\$6,103,966
TOTAL		\$2,575,272		\$2,312,295		\$2,719,262		\$4,939,325		\$6,372,065
DSU Perkins Loan	135	\$486,088	97	\$338,385	102	\$339,374	68	\$246,392	92	\$293,000
FWS	97	\$244,340	71	\$203,933	65	\$213,858	86	\$202,185	101	\$247,091
FSEOG	402	\$118,950	475	\$155,039	434	\$134,591	336	\$138,967	536	\$118,092
LEAP	138	\$75,100	98	\$71,100	107	\$62,700	124	\$69,500	124	\$80,300
Pell	1,745	\$3,849,644	1,761	\$4,189,347	2,373	\$6,538,252	4,103	\$14,558,351	5,207	\$19,773,229
TOTAL		\$4,774,122		\$4,957,804		\$7,288,775		\$15,215,395		\$20,511,712
CEU Perkins Loan	19	\$42,094	28	\$52,944	20	\$44,046	14	\$23,456	10	\$15,760
FWS	29	\$43,550	38	\$53,568	38	\$51,741	20	\$20,283	28	\$41,363
FSEOG	93	\$69,660	54	\$39,215	70	\$52,305	66	\$53,630	75	\$57,867
LEAP	64	\$34,600	62	\$28,469	46	\$23,873	35	\$26,100	37	\$27,647
Pell	619	\$1,562,878	539	\$1,347,201	621	\$1,801,539	901	\$3,204,529	1,210	\$4,392,056
TOTAL		\$1,752,782		\$1,521,397		\$1,973,504		\$3,327,998		\$4,534,693
UVU Perkins Loan	160	\$460,135	133	\$354,511	45	\$129,326	64	\$174,000	30	\$79,750
FWS	374	\$1,202,709	208	\$612,185	283	\$807,991	179	\$715,072	407	\$1,171,133
FSEOG	1,495	\$1,186,648	1,656	\$767,866	1,080	\$520,984	1,887	\$451,986	1,929	\$638,237
LEAP	822	\$278,800	1,102	\$257,800	750	\$235,500	1,001	\$271,800	1,117	\$301,599
Pell	7,464	\$16,391,975	7,298	\$17,293,122	8,205	\$22,055,335	12,007	\$42,514,124	14,800	\$56,003,580
TOTAL		\$19,520,267		\$19,285,484		\$23,749,136		\$44,126,982		\$58,194,299
SLCC Perkins Loan	506	\$810,510	443	\$899,477	260	\$603,173	305	\$605,934	297	\$547,427
FWS	132	\$338,804	132	\$325,811	190	\$431,758	198	\$475,283	182	\$467,189
FSEOG	549	\$381,763	560	\$409,444	449	\$365,825	504	\$378,562	510	\$588,206
LEAP	447	\$327,300	452	\$313,000	328	\$282,700	350	\$318,800	412	\$323,600
Pell	5,879	\$11,326,298	5,530	\$11,176,301	6,427	\$14,617,064	10,807	\$32,212,720	13,238	\$41,472,610
TOTAL		\$13,184,675		\$13,124,033		\$16,300,520		\$33,991,299		\$43,399,032
TOTAL Perkins Loan	4,534	\$12,255,959	3,000	\$8,209,920	2,406	\$6,317,042	2,889	\$7,106,011	3,011	\$7,431,402
USHE FWS	2,082	\$5,142,219	2,101	\$5,000,372	2,332	\$5,708,952	2,322	\$6,299,832	2,110	\$5,691,651
FSEOG	7,567	\$4,595,159	7,404	\$4,334,742	8,051	\$4,258,522	6,971	\$3,885,252	8,300	\$4,094,597
LEAP	3,654	\$1,869,600	3,800	\$1,797,049	3,292	\$1,663,653	3,017	\$1,778,992	3,267	\$1,857,586
Pell	34,920	\$79,016,139	33,305	\$79,519,539	36,088	\$97,505,385	52,012	\$178,845,149	64,506	\$234,859,055
TOTAL		\$102,879,076		\$98,861,622		\$115,453,554		\$197,915,236		\$253,934,291

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2011-12		2012-13		2013-14		2014-15		2015-16		
	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	No. of Students	Dollar Amount	
UU	Perkins Loan	1,849	\$4,145,697	1,787	\$4,047,324	1,950	\$4,133,316	1,888	\$4,273,880	2,538	\$4,522,873
	FWS	405	\$1,407,502	391	\$1,360,896	413	\$1,433,811	397	\$1,268,181	400	\$1,196,487
	FSEOG	1,250	\$936,876	1,424	\$1,060,578	1,604	\$1,195,397	1,694	\$1,256,102	1,789	\$1,311,402
	LEAP		*		*		*		*		*
	Pell	8,880	\$32,232,699	8,917	\$32,800,048	8,368	\$31,491,456	7,956	\$30,003,457	7,660	\$29,283,233
	TOTAL		\$38,722,774		\$39,268,846		\$38,253,980		\$36,801,620		\$36,313,995
USU	Perkins Loan	803	\$1,854,836	1,090	\$2,613,171	872	\$1,944,077	526	\$1,394,947	728	\$2,001,043
	FWS	383	\$1,291,454	483	\$1,314,513	476	\$1,349,729	472	\$1,472,229	449	\$1,393,467
	FSEOG	1,360	\$919,379	1,359	\$952,393	1,332	\$922,388	1,167	\$921,088	1,317	\$920,956
	LEAP		*		*		*		*		*
	Pell	10,500	\$36,913,317	10,212	\$37,608,539	10,179	\$37,057,695	10,239	\$38,010,193	9,980	\$37,407,946
	TOTAL		\$40,978,986		\$42,488,616		\$41,273,889		\$41,798,457		\$41,723,412
WSU	Perkins Loan	65	\$177,437	231	\$789,032	432	\$1,283,714	299	\$878,493	421	\$1,415,839
	FWS	327	\$990,407	381	\$1,089,337	352	\$1,095,304	342	\$1,153,919	343	\$850,052
	FSEOG	959	\$670,513	1,355	\$670,839	1,118	\$596,426	791	\$513,717	741	\$506,353
	LEAP		*		*		*		*		*
	Pell	8,591	\$29,421,332	9,098	\$30,895,461	8,334	\$28,814,605	8,027	\$28,716,432	7,462	\$26,329,799
	TOTAL		\$31,259,689		\$33,444,669		\$31,790,049		\$31,262,561		\$29,102,043
SUU	Perkins Loan	88	\$253,700	111	\$343,323	127	\$433,500	100	\$335,011	52	\$246,471
	FWS	225	\$284,348	212	\$284,348	194	\$278,050	198	\$284,347	178	\$284,438
	FSEOG	457	\$195,348	545	\$198,604	556	\$192,091	560	\$195,348	517	\$195,348
	LEAP		*		*		*		*		*
	Pell	3,343	\$12,923,168	3,229	\$12,842,204	3,115	\$12,236,999	3,050	\$12,162,526	2,950	\$11,967,705
	TOTAL		\$13,656,564		\$13,668,479		\$13,140,640		\$12,977,232		\$12,437,962
SNOW	Perkins Loan	0	\$0	0	\$0	0	\$0	0	\$0		
	FWS	74	\$95,191	82	\$96,504	83	\$120,900	90	\$114,394	110	\$154,397
	FSEOG	349	\$136,528	305	\$109,524	213	\$109,788	236	\$118,404	151	\$77,731
	LEAP		*		*		*		*		*
	Pell	1,626	\$5,915,921	1,600	\$5,822,523	1,518	\$6,596,082	1,639	\$6,051,331	1,617	\$6,211,599
	TOTAL		\$6,147,640		\$6,028,551		\$6,826,770		\$6,284,129		\$6,443,727
DSU	Perkins Loan	55	\$203,375	60	\$210,000	88	\$284,315	95	\$278,618	47	\$235,535
	FWS	107	\$285,363	102	\$254,323	118	\$315,977	111	\$301,110	117	\$305,284
	FSEOG	309	\$161,250	395	\$230,715	492	\$251,648	437	\$220,119	346	\$174,716
	LEAP		*		*		*		*		*
	Pell	5,594	\$19,280,928	4,971	\$17,742,978	4,638	\$16,734,247	4,483	\$15,924,152	3,880	\$14,147,361
	TOTAL		\$19,930,916		\$18,438,016		\$17,586,187		\$16,723,999		\$14,862,896
CEU	Perkins Loan	**	**	**	**	**	**	**	**		
	FWS	**	**	**	**	**	**	**	**		
	FSEOG	**	**	**	**	**	**	**	**		
	LEAP	*	*	*	*	*	*	*	*		
	Pell	**	**	**	**	**	**	**	**		
	TOTAL		\$0		\$0		\$0		\$0		\$0
UVU	Perkins Loan	71	\$183,000	58	\$150,500	93	\$327,632	122	\$447,381	74	\$338,260
	FWS	156	\$558,488	235	\$712,765	333	\$818,482	154	\$32,369	195	\$591,971
	FSEOG	1,683	\$477,909	2,669	\$785,200	1,991	\$734,973	1,706	\$987,152	1,974	\$737,857
	LEAP		*		*		*		*		*
	Pell	15,821	\$55,636,977	14,908	\$52,403,553	13,463	\$47,703,090	0	\$47,199,077	13,148	\$45,293,943
	TOTAL		\$56,856,374		\$54,052,018		\$49,584,177		\$49,065,979		\$46,962,031
SLCC	Perkins Loan	303	\$562,585	276	\$529,256	394	\$694,097	306	\$697,540	157	\$353,182
	FWS	141	\$393,290	142	\$441,627	163	\$489,487	233	\$614,149	187	\$580,968
	FSEOG	643	\$532,942	479	\$3,698,900	725	\$630,583	856	\$731,871	749	\$662,618
	LEAP		*		*		*		*		*
	Pell	14,547	\$42,324,972	14,188	\$41,499,839	13,518	\$39,344,122	12,019	\$34,523,919	9,668	\$28,851,255
	TOTAL		\$43,813,789		\$46,169,622		\$41,158,289		\$36,567,479		\$30,448,022
TOTAL	Perkins Loan	3,234	\$7,380,630	3,613	\$8,682,606	3,956	\$9,100,651	3,336	\$8,305,870	4,017	\$9,113,203
USHE	FWS	1,818	\$5,020,680	2,028	\$5,554,313	2,132	\$5,901,740	1,997	\$5,640,698	1,979	\$5,101,064
	FSEOG	7,010	\$4,030,745	8,531	\$7,706,753	8,031	\$4,633,294	7,447	\$4,943,801	7,584	\$4,586,981
	LEAP	0	*	0	\$0	0	\$0	0	\$0	0	\$0
	Pell	68,902	\$234,649,314	67,123	\$231,615,145	63,133	\$219,978,296	47,413	\$212,591,087	56,365	\$199,492,841
	TOTAL		\$251,081,369		\$253,558,817		\$239,613,981		\$231,481,456		\$218,294,089

Notes:

(1) Perkins Loan, PELL, FWS, FSEOG expenditures compiled from Institutional FISAPs as of June 30 of AY 15-16.

(2) LEAP expenditures from institutions; LEAP Performance Report as of June 30 of AY 10-11.

* LEAP has not been funded by the U.S. Department of Education since 2011-2012.

** In 2011-12 CEU became a campus of USU (USU-Eastern) and all reporting now is through USU.

III. PROGRAM-BASED STUDENT FINANCIAL AID

INTRODUCTION

The following tables provide statistical information for program-based student financial aid programs administered by the Office of the Commissioner or the Utah Higher Educational Assistance Authority (UHEAA) or USHE institutions. These programs are: (1) the Western Interstate Commission for Higher Education (WICHE) Exchange Program, (2) the Regional Dental Education Program (RDEP), (3) the Terrel H. Bell Teaching Incentive Loan (TIL) Program, and (4) the institutionally-based Educationally Disadvantaged Programs.

WESTERN INTERSTATE COMMISSION FOR HIGHER EDUCATION (WICHE)

WICHE's Professional Student Exchange Program enables students in 15 western states to enroll in selected out-of-state professional programs when those fields of study are not available at public institutions in their home state. Exchange students pay reduced levels of tuition and the state pays a support fee to the admitting schools to help cover the cost difference between resident and non-resident tuition.

REGIONAL DENTAL EXCHANGE PROGRAM (RDEP)

RDEP enables students each year to begin the study of dentistry. The first year of study is completed at the University of Utah School of Medicine. The final three years are completed through a contract with Creighton University, a private institution where students pay reduced tuition because of the RDEP contract. Beginning with the 2005 class, RDEP will function as a loan repayment program for students who are accepted to a School of Dentistry and RDEP, if they return to Utah to practice dentistry after graduation.

With the inauguration of the new University of Utah School of Dentistry in 2017, the RDEP program will be retired when the last RDEP students complete their education in 2016.

TERREL H. BELL TEACHING INCENTIVE LOAN (TIL)

The TIL Program, formerly the Utah Career Teaching Scholarship, is state-funded. The program waives tuition and fees at the Utah public institutions of higher education, and pays toward tuition costs at BYU and Westminster College, for a period of up to four years. Recipients are required to pursue a teacher education program and to teach in Utah public or private schools for a period equal to the time they receive TIL assistance. If for some reason the recipient does not complete an education program and teach in a Utah public school, they are required to repay all TIL funds received with interest.

EDUCATIONALLY DISADVANTAGED

The Educationally Disadvantaged Program is funded by line item appropriations to the eight USHE institutions. The appropriations are to be used to support the educational needs of students who, because of their social-economic status or demographics, have historically been disadvantaged from pursuing a higher education. Funds may be spent on tuition assistance, counselors, advisors, or tutoring.

Table 5

**Western Interstate Commission for Higher Education (WICHE)
Scholarships Awarded**

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Veterinary Medicine # of Awards	28	30	29	28	25	22	17	11	5	0
\$ Amount	\$584,200	\$657,500	\$652,800	\$660,350	\$654,750	\$575,050	\$435,000	\$321,300	\$156,500	\$0
Optometry # of Awards	12	10	8	7	7	9	12	15	20	25
\$ Amount	\$163,200	\$141,000	\$116,800	\$105,700	\$109,200	\$142,200	\$193,200	\$246,000	\$336,000	\$427,500
Podiatry # of Awards	3	4	4	2	4	3	7	10	16	18
\$ Amount	\$35,700	\$49,200	\$50,800	\$26,200	\$54,000	\$41,100	\$97,300	\$142,000	\$232,000	\$251,090
Administrative Fee # of Awards	112,000	116,000	120,000	124,800	125,000	125,000	131,000	131,000	137,000	\$141,000
TOTAL # of Awards	43	44	41	37	36	34	36	36	41	43
\$ Amount	\$895,100	\$963,700	\$940,400	\$917,050	\$942,950	\$883,350	\$856,500	\$840,300	\$861,500	\$819,590

**Regional Dental Exchange Program (RDEP)
Scholarships Awarded**

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
State Appropriation # of Awards	40	40	40	40	40	40	40	50	50	50
\$ Amount	\$ 569,700	\$ 589,500	\$ 605,600	\$ 551,000	\$ 503,100	\$ 525,300	\$ 529,600	\$529,600	\$543,000	\$569,400

Notes:

- (1) The Student Exchange Program administered through the Western Interstate Commission for Higher Education (WICHE) and the Regional Dental Education Program (RDEP) assist Utah students in obtaining training in dentistry, veterinary medicine, optometry and podiatry under the interstate compact. Participating students pay resident tuition and general fees of the receiving state or reduced tuition at private institutions. The chart above is a summary of Utah's participation in these programs.
- (2) Beginning in 2012-2013, the State Board of Regents discontinued funding new, first year, veterinary medicine students now that USU has a veterinary medicine program.
- (3) RDEP assists Utah students to obtain training in dentistry through a contract with Creighton University. Participating students begin studying at the University of Utah School of Medicine and then receive reduced tuition at the private institution. Beginning with the 2004 class, students who study at other institutions may receive partial loan forgiveness if they return to Utah to practice.

Table 6

USHE Terrel H. Bell Teaching Incentive Loan (TIL)⁽¹⁾

2011-12 through 2015-16

WAIVERS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2011-12	122	\$278,014	255	\$612,447	250	\$633,777	44	\$87,933	671	365	\$1,612,171
2012-13	65	\$147,601	293	\$749,490	138	\$346,853	153	\$368,880	649	369	\$1,612,824
2013-14	64	\$146,715	145	\$387,735	370	\$986,388	148	\$360,469	727	411	\$1,881,307
2014-15	127	\$326,316	240	\$617,562	149	\$408,330	172	\$479,862	688	419	\$1,832,070
2015-16	18	\$43,465	279	\$763,109	179	\$470,198	184	\$507,485	660	401	\$1,784,257
STIPENDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2011-12	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2012-13	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2013-14	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2014-15	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2015-16									0		\$0
PREMIER AWARDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2011-12	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2012-13	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2013-14	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2014-15	0	\$0	0	\$0	0	\$0	0	\$0	0	0	\$0
2015-16									0		\$0
TOTAL AWARDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
2011-12	122	\$278,014	255	\$612,447	250	\$633,777	44	\$87,933	671	365	\$1,612,171
2012-13	65	\$147,601	293	\$749,490	138	\$346,853	153	\$368,880	649	369	\$1,612,824
2013-14	64	\$146,715	145	\$387,735	370	\$986,388	148	\$360,469	727	411	\$1,881,307
2014-15	127	\$326,316	240	\$617,562	149	\$408,330	172	\$479,862	688	419	\$1,832,070
2015-16	18	\$43,465	279	\$763,109	179	\$470,198	184	\$507,485	660	401	\$1,784,257
OTHER										Administrative Support Costs	Total Expenditures
2011-12										\$62,029	\$1,674,200
2012-13										\$61,566	\$1,674,390
2013-14										\$64,091	\$1,945,398
2014-15										\$57,296	\$1,889,366
2015-16										\$117,448	\$1,901,705

Notes:

(1) The Terrel H. Bell Teaching Incentive Loan (TIL) is designed to encourage outstanding students to pursue careers as teachers. The program is open to students enrolled in a program of program of study leading to teacher certification in a state-supported college or university, Brigham Young University, or Westminster College.

Table 7

Utah Engineering and Computer Science Scholarship Program (UECSP) FY 2015-16
 Planning Worksheet

Formula

Two times the number of Associate Degrees

Four times the number of Bachelor Degrees

Two times the number of Master Degrees

Five times the number of Doctoral Degrees

Funds are distributed based on the percentage of the whole.

Graduates--2014						
Institution	Associate	Bachelor	Master	Doctoral	Formula	Percent
University of Utah	0	581	268	80	3260	43.57%
Utah State University	6	315	126	26	1654	22.11%
Weber State University	55	191	0	0	874	11.68%
Southern Utah University	3	40	0	0	166	2.22%
Snow College	30	0	0	0	60	0.80%
Dixie State University	1	35	0	0	142	1.90%
Utah Valley University	126	180	0	0	972	12.99%
Salt Lake Community College	177	0	0	0	354	4.73%
Total	398	1,342	394	106	7482	100%

Scholarship Funds Available for FY 2015-16:	\$38,400
Carry-Over from Previous Years:	\$0
Total Available for Allocation:	\$38,400

Institution	Scholarship Share	Amount Disbursed	Students Awarded
University of Utah	\$ 16,731	\$ 36,700	22
Utah State University	\$ 8,489	\$ 8,489	6
Weber State University	\$ 4,486	\$ 3,348	3
Southern Utah University	\$ 852	\$ -	0
Snow College	\$ 308	\$ -	0
Dixie State University	\$ 729	\$ 729	1
Utah Valley University	\$ 4,989	\$ 4,989	6
Salt Lake Community College	\$ 1,817	\$ -	0
Total	\$ 38,400	\$ 54,255	38

Table 8

USHE Educationally Disadvantaged Programs

<i>Utilization of Funds for Eligible Purposes</i>				<i>Scholarship Measures</i>			
Expenditure Category	2014-15	2015-16	Budget 2016-17	Measure	2014-15	2015-16	Budget 2016-17
University of Utah				University of Utah			
Scholarships - General	\$163,090	\$155,932	\$174,324	Students receiving general scholarships	213	210	223
Scholarships - Minority Students	71,600	68,457	76,532	Average per student	\$766	\$743	\$782
Tutoring	72,591	69,405	77,591	Minority students receiving scholarships	93	91	98
Counseling	381,101	364,375	407,353	Average per minority student	\$770	\$752	\$781
Total Expenditures	\$688,382	\$658,169	\$735,800				
Utah State University				Utah State University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	0	0	0
Scholarships - Minority Students	104,490	88,042	88,000	Average per student	\$0	\$0	\$0
Tutoring	7,310	11,991	12,000	Minority students receiving scholarships	22	19	20
Counseling	0	0	0	Average per minority student	\$4,750	\$4,634	\$4,400
Total Expenditures	\$111,800	\$100,033	\$100,000				
Weber State University				Weber State University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	n/a	n/a	n/a
Scholarships - Minority Students	0	0	0	Average per student	n/a	n/a	n/a
Tutoring	22,878	15,088	15,088	Minority students receiving scholarships	n/a	n/a	n/a
Counseling/Other scholarship	290,390	330,212	355,512	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$313,268	\$345,300	\$370,600				
Southern Utah University				Southern Utah University			
Scholarships - General	\$31,643	\$31,193	\$24,250	Students receiving general scholarships	40	38	30
Scholarships - Minority Students	28,100	19,900	22,000	Average per student	\$791	\$821	\$808
Tutoring	0	0	0	Minority students receiving scholarships	32	26	24
Counseling	40,092	50,523	47,250	Average per minority student	\$878	\$765	\$917
Total Expenditures	\$99,835	\$101,616	\$93,500				
Snow College				Snow College			
Scholarships - General	\$32,000	\$32,000	\$32,000	Students receiving general scholarships	71	88	80
Scholarships - Minority Students	0	0	0	Average per student	\$451	\$364	\$400
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling/Other scholarship	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$32,000	\$32,000	\$32,000				
Dixie State University				Dixie State University			
Scholarships - General	\$4,656	\$1,700	\$0	Students receiving general scholarships	4	1	0
Scholarships - Minority Students	20,844	23,800	25,500	Average per student	\$1,164	\$1,700	\$0
Tutoring	0	0	0	Minority students receiving scholarships	24	19	20
Counseling	0	0	0	Average per minority student	\$869	\$1,253	\$1,275
Total Expenditures	\$25,500	\$25,500	\$25,500				
Utah Valley University				Utah Valley University			
Scholarships - General	\$0	\$0	\$0	Students receiving general scholarships	n/a	n/a	n/a
Scholarships - Minority Students	0	0	0	Average per student	n/a	n/a	n/a
Tutoring	21,552	23,317	21,864	Minority students receiving scholarships	n/a	n/a	n/a
Counseling	140,992	143,183	148,536	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$162,544	\$166,500	\$170,400				
Salt Lake Community College				Salt Lake Community College			
Scholarships - General	\$110,251	\$395,912	\$178,400	Students receiving general scholarships	211	355	200
Scholarships - Minority Students	0	0	0	Average per student	\$523	\$1,115	\$892
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$110,251	\$395,912	\$178,400				
Utah System of Higher Education				Utah System of Higher Education			
Scholarships - General	\$341,640	\$716,737	\$508,974	Students receiving general scholarships	539	692	533
Scholarships - Minority Students	\$225,034	\$200,199	\$212,032	Average per student	\$634	\$1,036	\$955
Tutoring	\$124,331	\$119,801	\$126,543	Minority students receiving scholarships	171	155	162
Counseling/Other scholarship	\$852,575	\$893,293	\$963,651	Average per minority student	\$1,316	\$1,292	\$1,309
Total Expenditures	\$1,543,580	\$1,930,030	\$1,811,200				

VI. STATUTORY TUITION WAIVERS

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

2012-13	2013-14	2014-15	2015-16
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Resident Tuition Waivers

Resident 10% Meritorious/Impecunious				
UU	\$9,083,957	\$9,533,772	\$9,794,787	\$9,322,153
USU	6,879,542	6,803,868	7,094,309	7,532,780
WSU	5,311,441	5,567,997	6,165,318	6,665,314
SUU	2,764,477	2,837,425	2,887,638	3,158,621
Snow	878,115	899,840	989,632	1,137,933
DSU	2,043,172	2,015,629	2,086,909	2,121,025
UVU	6,383,524	6,111,436	6,681,297	7,740,608
SLCC	1,845,775	2,007,869	2,007,960	2,427,318
Subtotal	\$35,190,003	\$35,777,836	\$37,707,850	\$40,105,752

Resident National Guard Waivers Set-aside				
UU	\$124,972	\$153,081	\$163,079	\$175,717
USU	94,741	109,574	166,843	245,255
WSU	88,840	66,548	126,241	138,078
SUU	68,200	54,684	70,116	73,303
Snow	4,044	6,580	2,998	10,808
DSU	0	9,620	29,388	37,126
UVU	84,501	86,016	143,769	139,800
SLCC	12,416	19,006	21,286	37,030
Subtotal	\$477,714	\$505,109	\$723,720	\$857,117

Critical Occupations				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0

Senior Citizens				
UU	\$1,009,174	\$1,135,246	\$1,425,886	\$1,775,364
USU	3,687	6,326	10,874	3,461
WSU	120,767	167,859	0	143,625
SUU	0	0	0	0
Snow	0	0	0	0
DSU	54,203	59,315	64,196	81,992
UVU	102,415	110,737	111,888	125,304
SLCC	129,802	124,614	177,620	59,193
Subtotal	\$1,420,048	\$1,604,098	\$1,790,464	\$2,188,939

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2012-13	2013-14	2014-15	2015-16
Police or Firefighter Survivor				
UU	\$0	\$0	\$0	\$0
USU	1,303	1,376	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	948	5,688	1,954
UVU	5,466	1,176	0	0
SLCC	0	1,463	0	0
Subtotal	\$6,769	\$4,963	\$5,688	\$1,954
Wards of the State				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0
Public School Teachers				
UU	\$13,890	\$133,673	\$52,252	\$23,640
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$13,890	\$133,673	\$52,252	\$23,640
Sequential Mandarin Chinese				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$0	\$0	\$0	\$0

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2012-13	2013-14	2014-15	2015-16
Purple Heart Waiver				
UU	\$61,734	\$62,304	\$59,086	\$24,802
USU	51,327	44,093	51,278	20,755
WSU	29,297	26,825	19,552	26,293
SUU	14,674	15,142	13,032	7,381
Snow	0	0	0	0
DSU	6,048	9,120	14,062	9,933
UVU	32,797	28,401	33,599	27,004
SLCC	28,278	20,573	14,196	9,126
Subtotal	\$224,155	\$206,458	\$204,805	\$125,294
Scott B. Lundell-Fallen Soldiers' Dependents Waiver				
UU	\$0	\$3,256	\$0	\$0
USU	0	4,548	4,639	0
WSU	0	1,943	0	11,217
SUU	0	0	0	0
Snow	0	0	0	0
DSU	7,724	0	0	0
UVU	1,737	5,970	7,562	7,736
SLCC	0	0	4,559	779
Subtotal	\$9,461	\$15,716	\$16,760	\$19,732
Athletic Waivers- Residents				
UU	\$588,691	\$641,716	\$717,766	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	568,201	1,117,385	649,277	0
SLCC	139,330	132,188	140,820	0
Subtotal	\$1,296,222	\$1,891,289	\$1,507,863	\$0
Total Resident Waivers				
UU	10,882,418	11,663,049	12,212,856	11,321,676
USU	7,030,600	6,969,785	7,327,943	7,802,251
WSU	5,550,345	5,831,172	6,311,111	6,984,527
SUU	2,847,351	2,907,251	2,970,786	3,239,305
Snow	882,159	906,420	992,630	1,148,741
DSU	2,111,147	2,094,632	2,200,243	2,252,030
UVU	7,178,641	7,461,121	7,627,392	8,040,452
SLCC	2,155,601	2,305,713	2,366,441	2,533,446
Total Resident	\$38,638,262	\$40,139,142	\$42,009,402	\$43,322,428

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2012-13	2013-14	2014-15	2015-16
Nonresident Tuition Waivers				
Meritorious Nonresident Undergraduate				
UU	\$4,311,315	\$690,984	\$2,800,294	\$6,454,437
USU	1,036,257	7,513,221	7,593,534	9,248,083
WSU	1,422,914	2,055,238	2,272,869	2,561,714
SUU	265,664	1,306,893	1,955,717	5,014,564
Snow	30,978	213,559	645,498	671,652
DSU	242,575	312,592	336,862	270,695
UVU	572,604	2,477,996	4,082,754	5,621,363
SLCC	72,749	38,552	22,489	30,701
Subtotal	\$7,955,056	\$14,609,036	\$19,710,017	\$29,873,209
Meritorious Nonresident Graduate Waivers				
UU	\$0	\$0	\$0	\$0
USU	2,614,146	2,761,094	3,691,291	3,898,004
WSU	409,712	476,068	524,251	594,213
SUU	0	0	0	75,486
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$3,023,858	\$3,237,162	\$4,215,542	\$4,567,703
WICHE / WUE				
UU	\$1,848,415	\$2,829,641	\$2,989,399	\$2,267,986
USU	987,513	960,990	1,155,815	1,339,460
WSU	673,324	634,256	631,299	663,562
SUU	955,296	1,184,315	2,378,679	2,747,631
Snow	173,125	91,290	145,260	134,290
DSU	382,095	426,056	704,304	977,275
UVU	353,904	1,564,110	2,293,875	3,611,254
SLCC	121,018	178,303	181,138	178,598
Subtotal	\$5,494,690	\$7,868,961	\$10,479,769	\$11,920,056
Reciprocal Agreements				
UU	\$0	\$0	\$0	\$0
USU	609,932	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	251,803	292,584	272,956	210,357
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$861,735	\$292,584	\$272,956	\$210,357
Border Waivers				
UU	\$67,327	\$45,222	\$53,824	\$0
USU	245,385	19,383	23,178	6,858
WSU	8,097	16,642	8,654	6,320
SUU	49,087	32,173	8,247	2,789
Snow	0	0	0	0
DSU	149,137	124,632	142,728	77,491
UVU	0	0	0	9,816
SLCC	0	0	0	0
Subtotal	\$519,033	\$238,052	\$236,631	\$103,274

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2012-13	2013-14	2014-15	2015-16
Certain Utah High School Graduates- Undocumented				
UU	\$748,570	\$824,475	\$907,728	\$1,055,793
USU	153,706	183,972	242,078	278,426
WSU	325,731	427,325	468,399	525,223
SUU	11,408	70,736	93,435	126,505
Snow	0	0	0	0
DSU	0	0	0	0
UVU	1,269,245	1,226,824	1,406,934	1,488,840
SLCC	664,343	1,640,874	1,750,716	2,068,144
Subtotal	\$3,173,003	\$4,374,206	\$4,869,290	\$5,542,931
Certain Utah High School Graduates-Foreign Nationals				
UU	\$0	\$440,535	\$487,766	\$570,878
USU	60,587	78,734	84,367	100,055
WSU	39,821	33,454	21,881	118,503
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	131,481	124,292	156,907	183,748
SLCC	8,553	68,896	61,902	72,172
Subtotal	\$240,442	\$745,911	\$812,823	\$1,045,356
Nonresident Transition Waivers				
UU	\$580,559	\$457,841	\$205,016	\$196,219
USU	2,754,640	391,527	20,514	0
WSU	395,632	0	0	0
SUU	665,456	518,500	293,798	944,981
Snow	0	0	0	0
DSU	1,288,212	1,983,859	2,570,621	3,078,379
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$5,684,499	\$3,351,726	\$3,089,949	\$4,219,579
Athletic Waivers- Non-Residents				
UU	\$0	\$0	\$0	\$665,019
USU	1,659,377	1,428,300	1,713,091	1,753,427
WSU	1,085,228	1,226,655	1,283,475	1,323,522
SUU	684,783	772,723	819,025	844,000
Snow	368,121	431,764	353,105	323,973
DSU	191,487	198,288	205,030	243,842
UVU	570,174	0	641,309	1,482,284
SLCC	263,986	274,459	240,560	161,250
Subtotal	\$4,823,156	\$4,332,189	\$5,255,595	\$6,797,317

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2012-13	2013-14	2014-15	2015-16
Alumni Legacy Scholarship				
UU	\$0	\$52,500	\$135,000	\$178,500
USU	7,687,429	9,902,082	12,892,845	17,148,770
WSU	375,513	414,679	333,171	386,634
SUU	305,439	207,792	259,739	279,150
Snow	0	0	0	0
DSU	153,329	228,288	240,936	232,158
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$8,521,710	\$10,805,342	\$13,861,691	\$18,225,212
Total Non-Resident Waivers				
UU	\$7,556,186	\$5,341,199	\$7,579,027	\$11,388,832
USU	17,808,972	23,239,304	27,416,713	33,773,083
WSU	4,735,972	5,284,318	5,543,999	6,179,691
SUU	2,937,133	4,093,132	5,808,640	10,035,106
Snow	572,224	736,613	1,143,863	1,129,915
DSU	2,658,638	3,566,299	4,473,437	5,090,197
UVU	2,897,408	5,393,222	8,581,779	12,397,305
SLCC	1,130,649	2,201,084	2,256,805	2,510,865
Total Non-Resident	\$40,297,182	\$49,855,170	\$62,804,263	\$82,504,994
Total Waivers (Resident and Nonresident)				
UU	\$18,438,604	\$17,004,247	\$19,791,883	\$22,710,508
USU	\$24,839,572	\$30,209,088	\$34,744,656	\$41,575,334
WSU	\$10,286,317	\$11,115,490	\$11,855,110	\$13,164,218
SUU	\$5,784,484	\$7,000,383	\$8,779,426	\$13,274,411
Snow	\$1,454,383	\$1,643,033	\$2,136,493	\$2,278,656
DSU	\$4,769,785	\$5,660,931	\$6,673,680	\$7,342,227
UVU	\$10,076,049	\$12,854,343	\$16,209,170	\$20,437,757
SLCC	\$3,286,250	\$4,506,797	\$4,623,246	\$5,044,311

(1) New waiver beginning 2004-05: Purple Heart Recipient Waiver

New Waiver beginning 2006-07: Scott B. Lundell- Fallen Soldiers' Dependents Waiver

New waiver beginning approx 2009: Alumni Legacy Scholarship Waiver

No waivers were granted for Critical Occupations or Sequential Mandarin Chinese

V. TUITION SET ASIDES FOR NEED-BASED FINANCIAL AID

Table 10

USHE First Tier Tuition Set Aside for Financial Aid

Utilization of Funds for Eligible Purposes			Productivity Measures				
Expenditure Category	2015-16	Budget 2016-17	Measure	2015-16		Budget 2016-17	
				Number	Average Amount	Number	Average Amount
University of Utah			University of Utah				
Need-based Grants	\$2,021,390	\$2,501,443	Students Receiving Need-based Grants	2,751	\$735	3,127	\$800
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	62	\$3,148	63	\$3,175
Other housing stipends	195,200	200,000	Total Receiving Need-based Aid	2,792	\$794	3,190	\$847
Total Expenditures	\$2,216,590	\$2,701,443					
Utah State University			Utah State University				
Need-based Grants	\$277,497	\$278,000	Students Receiving Need-based Grants	116	\$2,392	115	\$2,417
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	426	\$797	549	\$619
Other- Undergrad. Teaching Fellows	339,700	339,700	Total Receiving Need-based Aid	542	\$1,139	664	\$930
Total Expenditures	\$617,197	\$617,700					
Weber State University			Weber State University				
Need-based Grants	\$0	\$0	Students Receiving Need-based Grants	0	\$0	0	\$0
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	365	\$1,520	340	\$1,386
Need Based Other	554,679	471,299	Total Receiving Need-based Aid	365	\$1,520	340	\$1,386
Total Expenditures	\$554,679	\$471,299					
Southern Utah University			Southern Utah University				
Need-based Grants	\$276,322	\$340,000	Students Receiving Need-based Grants	50	\$5,526	60	\$5,667
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	0	0	Total Receiving Need-based Aid	50	\$5,526	60	\$5,667
Total Expenditures	\$276,322	\$340,000					
Snow College			Snow College				
Need-based Grants	\$0	\$0	Students Receiving Need-based Grants	0	\$0	0	\$0
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based: Other*	131	\$3,053	130	\$3,077
Need Based Other	400,000	400,000	Total Receiving Need-based Aid	131	\$3,053	130	\$3,077
Total Expenditures	\$400,000	\$400,000					
Dixie State University			Dixie State University				
Need-based Grants	\$20,025	\$20,025	Students Receiving Need-based Grants	15	\$1,335	15	\$1,335
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	0	0	Total Receiving Need-based Aid	15	\$1,335	15	\$1,335
Total Expenditures	\$20,025	\$20,025					
Utah Valley University			Utah Valley University				
Need-based Grants	\$297,500	\$297,500	Students Receiving Need-based Grants	150	\$1,983	160	\$1,859
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	0	0	Total Receiving Need-based Aid	150	\$1,983	160	\$1,859
Total Expenditures	\$297,500	\$297,500					
Salt Lake Community College			Salt Lake Community College				
Need-based Grants	\$213,700	\$213,700	Students Receiving Need-based Grants	237	\$902	230	\$929
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	0	0	Total Receiving Need-based Aid	237	\$902	230	\$929
Total Expenditures	\$213,700	\$213,700					
Utah System of Higher Education			Utah System of Higher Education				
Need-based Grants	\$3,106,434	\$3,650,668	Students Receiving Need-based Grants	3,319	\$936	3,707	\$984.80
Need-based Loans	0	0	Students Receiving Need-based Loans	0	\$0	0	\$0
Need-based Work Study Awards	0	0	Students Receiving Need-based Work Study Awards/other	984	\$1,514	1,082	\$1,304
2nd-Tier Tuition Based Scholarships	1,489,579	1,410,999	Total Receiving Need-based Aid	4,282	\$1,073	4,789	\$1,056.94
Total Expenditures	\$4,596,013	\$5,061,667					

*The U of U, USU, WSU, and Snow provided other types of need based awards. Their respective productivity measures reflect these other rewards.