

## **Tab F – Paying For College**



UTAH SYSTEM OF  
HIGHER EDUCATION

*Building a Stronger State of Minds*

I. State Student Financial Access Programs ..... 1

TABLE 1 Utah Educational Savings Plan (UESP) ..... 4

TABLE 2 Higher Education Success Stipend Program (HESSP) ..... 4

TABLE 3 Veterans Tuition Gap Program (VeT Gap) ..... 5

II. Federal Campus-Based Student Financial Aid..... 6

TABLE 4 USHE Federal and State Matching Student Financial Aid..... 7

III. Program-Based Student Financial Aid ..... 9

TABLE 5 Western Interstate Commission for Higher Education (WICHE) and  
Regional Dental Exchange Program (RDEP) ..... 10

TABLE 6 USHE Terrel H. Bell Teaching Incentive Loan (TIL) ..... 11

TABLE 7 Utah Engineering and Computer Science Scholarship Program (UECSP)..... 12

TABLE 8 USHE Educationally Disadvantaged Programs ..... 13

IV. Statutory Tuition Waivers ..... 14

TABLE 9 USHE Statutory Tuition Waivers ..... 14

V. Tuition Set Asides for Need-Based Financial Aid..... 20

TABLE 10 USHE First Tier Tuition Set Aside for Financial Aid..... 20

## 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:

- I. State Student Financial Access Programs
- II. Federal Campus-Based Student Financial Aid
- III. Program-Based Student Financial Aid
- 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 the Utah Educational Savings Plan Trust (UESP) and for two state-sponsored programs administered by the Utah Higher Education Assistance Authority: the Higher Education Success Stipend Program (HESSP) and the Veterans Tuition Gap Program (VeT Gap), 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 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.



**Utah Educational  
Savings Plan®**

[uesp.org](http://uesp.org) | 801.418.2551

As a direct-sold 529 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](http://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](http://uesp.org), call 800.418.2551 toll-free, or send an email to [info@uesp.org](mailto:info@uesp.org).

# # #

*Investing is an important decision. Read the Program Description in its entirety 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](http://uesp.org).*

*Investments in UESP are not insured or guaranteed by UESP, the Utah State Board of Regents, the Utah Higher Education Assistance Authority or any other state or federal agency. Your investment could lose value. 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.*

*The state in which you or your beneficiary pays taxes or lives may offer a 529 plan that provides state tax or other benefits, such as financial aid, scholarship funds, and protection from creditors, not otherwise available to you by investing in UESP. You should consider such 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 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 Utah Technical Colleges 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)
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
2017	241,488	\$10,913,000

Table 2

Higher Education Success Stipend Program (HESSP)  
Fiscal Year Ending June 30, 2017

Institution	Grant Award		Work Study Award		Administrative Expense	Total Expended
	#	\$	#	\$	\$	\$
U of U	400	302,903	0	0	9,375	312,278
USU	247	171,027	47	138,724	10,758	320,509
WSU	279	295,879	1	1,062	10	296,951
SUU	243	88,530	30	43,994	3,678	136,202
SNOW	111	59,710	1	1,000	1,590	62,300
DSU	3	2,789	49	150,762	4,749	158,300
UVU	581	462,800	0	0	14,000	476,800
SLCC	434	387,351	0	0	3,000	390,351
<b>TOTAL USHE</b>	<b>2,298</b>	<b>\$ 1,770,990</b>	<b>128</b>	<b>\$ 335,542</b>	<b>\$ 47,160</b>	<b>\$ 2,153,692</b>
BYU	77	167,000	0	0	0	167,000
LDSBC	27	11,900	0	0	0	11,900
WESTMINSTER	6	19,300	0	0	0	19,300
WGU	44	81,700	0	0	0	81,700
<b>TOTAL PRIVATE</b>	<b>154</b>	<b>\$ 279,900</b>	<b>0</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 198,200</b>
USTC*	141	\$ 52,965	0	\$ -	\$ 444	\$ 53,409
<b>FINAL TOTALS</b>	<b>2,593</b>	<b>\$ 2,103,854</b>	<b>128</b>	<b>\$ 335,542</b>	<b>\$ 47,604</b>	<b>\$ 2,405,301</b>

## Notes:

(1) HESSP data is compiled from annual reports provided by the participating institutions for the 2017 award year.

\* USTC was formerly known as UCAT.

**Table 3****Veteran Tuition Grant Program (VeT Gap)**

Fiscal Year Ending June 30, 2017

Institution	Awards		Administrative Expense	Total Expended
	#	\$	\$	\$
University of Utah	15	64,058	4,149	68,207
Utah State University	1	2,907	0	2,907
Weber State University	6	18,541	0	18,541
Southern Utah University	6	16,703	1,149	17,852
Dixie State University	1	1,539	46	1,585
Utah Valley University	3	6,273	0	6,273
<b>TOTAL USHE</b>	<b>32</b>	<b>\$ 110,020</b>	<b>\$ 5,344</b>	<b>\$ 115,364</b>
Embry Riddle Aeronautical University	2	5,880	0	5,880
Park University - Hill AFB Campus	1	2,961	0	2,961
Western Governors University	4	6,600	0	6,600
Westminster College	1	18,400	0	18,400
<b>TOTAL PRIVATE NOT-FOR-PROFIT</b>	<b>8</b>	<b>\$ 33,841</b>	<b>\$ -</b>	<b>\$ 33,841</b>
<b>FINAL TOTALS</b>	<b>40</b>	<b>\$ 143,861</b>	<b>\$ 5,344</b>	<b>\$ 149,205</b>

## Notes:

(1) VeT Gap data is compiled from annual reports provided by the participating institutions for the 2017 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 expired September 30, 2017. This program provided low interest (five percent) loans with a maximum 10 year repayment period to students with exceptional financial need.

*Congress has not funded the Perkins Loan Program since Fiscal Year 2006; however institutions continued to disburse program funds from prior year contributions until the program's expiration.*

### 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 2017-2018 award year the maximum grant amount is scheduled at \$5,920.

### 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	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
UU Perkins Loan	971	\$2,806,430	1,089	\$2,518,406	1,485	\$3,273,659	1,342	\$3,056,533
UU FWS	441	\$1,508,949	390	\$1,263,064	447	\$1,617,816	425	\$1,442,206
UU FSEOG	1,691	\$889,880	3,006	\$1,078,773	1,607	\$1,172,474	1,302	\$970,204
UU LEAP	1,206	\$421,280	1,206	\$421,280	583	\$406,620	574	\$411,600
UU Pell	5,010	\$12,228,721	4,882	\$13,663,216	6,204	\$21,110,783	7,986	\$30,596,971
UU TOTAL		\$17,855,260		\$18,944,739		\$27,581,352		\$36,477,514
USU Perkins Loan	870	\$2,313,153	319	\$873,418	434	\$1,181,471	797	\$2,153,545
USU FWS	595	\$1,349,830	698	\$1,728,761	594	\$1,601,487	407	\$1,091,096
USU FSEOG	1,063	\$871,244	1,023	\$854,960	1,041	\$828,376	2,442	\$826,261
USU LEAP	341	\$301,500	313	\$275,800	328	\$304,000	393	\$308,000
USU Pell	5,727	\$14,902,741	5,798	\$17,188,871	7,358	\$27,028,704	8,816	\$33,286,071
USU TOTAL		\$19,738,468		\$20,921,810		\$30,944,038		\$37,664,973
WSU Perkins Loan	309	\$1,003,962	509	\$1,622,388	444	\$1,405,161	356	\$1,016,561
WSU FWS	202	\$543,628	317	\$799,795	448	\$1,258,640	261	\$836,390
WSU FSEOG	770	\$885,005	1,072	\$946,562	659	\$566,285	669	\$590,858
WSU LEAP	227	\$253,400	262	\$225,200	312	\$244,500	270	\$247,400
WSU Pell	4,483	\$10,491,219	4,654	\$12,174,809	6,404	\$21,823,012	8,143	\$29,042,257
WSU TOTAL		\$13,177,214		\$15,768,754		\$25,297,598		\$31,733,466
SUU Perkins Loan	149	\$441,058	62	\$186,911	75	\$195,938	87	\$268,826
SUU FWS	293	\$284,347	232	\$284,371	236	\$284,348	212	\$284,348
SUU FSEOG	816	\$195,348	603	\$194,998	570	\$185,448	499	\$195,348
SUU LEAP	160	\$99,800	172	\$91,200	130	\$90,672	199	\$109,700
SUU Pell	2,157	\$5,869,114	2,265	\$7,029,574	2,952	\$11,734,843	3,499	\$14,188,315
SUU TOTAL		\$6,889,667		\$7,787,054		\$12,491,249		\$15,046,537
SNOW Perkins Loan	0	\$0	0	\$0	0	\$0	0	\$0
SNOW FWS	121	\$118,121	119	\$127,613	114	\$124,718	87	\$110,835
SNOW FSEOG	319	\$121,701	314	\$109,524	301	\$109,524	338	\$109,524
SNOW LEAP	152	\$50,700	108	\$45,400	154	\$47,000	141	\$47,740
SNOW Pell	800	\$2,021,773	863	\$2,436,725	1,276	\$4,658,083	1,607	\$6,103,966
SNOW TOTAL		\$2,312,295		\$2,719,262		\$4,939,325		\$6,372,065
DSU Perkins Loan	97	\$338,385	102	\$339,374	68	\$246,392	92	\$293,000
DSU FWS	71	\$203,933	65	\$213,858	86	\$202,185	101	\$247,091
DSU FSEOG	475	\$155,039	434	\$134,591	336	\$138,967	536	\$118,092
DSU LEAP	98	\$71,100	107	\$62,700	124	\$69,500	124	\$80,300
DSU Pell	1,761	\$4,189,347	2,373	\$6,538,252	4,103	\$14,558,351	5,207	\$19,773,229
DSU TOTAL		\$4,957,804		\$7,288,775		\$15,215,395		\$20,511,712
CEU Perkins Loan	28	\$52,944	20	\$44,046	14	\$23,456	10	\$15,760
CEU FWS	38	\$53,568	38	\$51,741	20	\$20,283	28	\$41,363
CEU FSEOG	54	\$39,215	70	\$52,305	66	\$53,630	75	\$57,867
CEU LEAP	62	\$28,469	46	\$23,873	35	\$26,100	37	\$27,647
CEU Pell	539	\$1,347,201	621	\$1,801,539	901	\$3,204,529	1,210	\$4,392,056
CEU TOTAL		\$1,521,397		\$1,973,504		\$3,327,998		\$4,534,693
UVU Perkins Loan	133	\$354,511	45	\$129,326	64	\$174,000	30	\$79,750
UVU FWS	208	\$612,185	283	\$807,991	179	\$715,072	407	\$1,171,133
UVU FSEOG	1,656	\$767,866	1,080	\$520,984	1,887	\$451,986	1,929	\$638,237
UVU LEAP	1,102	\$257,800	750	\$235,500	1,001	\$271,800	1,117	\$301,599
UVU Pell	7,298	\$17,293,122	8,205	\$22,055,335	12,007	\$42,514,124	14,800	\$56,003,580
UVU TOTAL		\$19,285,484		\$23,749,136		\$44,126,982		\$58,194,299
SLCC Perkins Loan	443	\$899,477	260	\$603,173	305	\$605,934	297	\$547,427
SLCC FWS	132	\$325,811	190	\$431,758	198	\$475,283	182	\$467,189
SLCC FSEOG	560	\$409,444	449	\$365,825	504	\$378,562	510	\$588,206
SLCC LEAP	452	\$313,000	328	\$282,700	350	\$318,800	412	\$323,600
SLCC Pell	5,530	\$11,176,301	6,427	\$14,617,064	10,807	\$32,212,720	13,238	\$41,472,610
SLCC TOTAL		\$13,124,033		\$16,300,520		\$33,991,299		\$43,399,032
TOTAL Perkins Loan	3,000	\$8,209,920	2,406	\$6,317,042	2,889	\$7,106,011	3,011	\$7,431,402
USHE FWS	2,101	\$5,000,372	2,332	\$5,708,952	2,322	\$6,299,832	2,110	\$5,691,651
USHE FSEOG	7,404	\$4,334,742	8,051	\$4,258,522	6,971	\$3,885,252	8,300	\$4,094,597
USHE LEAP	3,800	\$1,797,049	3,292	\$1,663,653	3,017	\$1,778,992	3,267	\$1,857,586
USHE Pell	33,305	\$79,519,539	36,088	\$97,505,385	52,012	\$178,845,149	64,506	\$234,859,055
USHE TOTAL		\$98,861,622		\$115,453,554		\$197,915,236		\$253,934,291

Table 4

## USHE Federal and State Matching Student Financial Aid

Institution	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	
UU	Perkins Loan	1,787	\$4,047,324	1,950	\$4,133,316	1,888	\$4,273,880	2,538	\$4,522,873
	FWS	391	\$1,360,896	413	1,433,811	397	\$1,268,181	400	\$1,196,487
	FSEOG	1,424	\$1,060,578	1,604	1,195,397	1,694	\$1,256,102	1,789	\$1,311,402
	LEAP		*		*		*		*
	Pell	8,917	\$32,800,048	8,368	\$31,491,456	7,956	\$30,003,457	7,660	\$29,283,233
	<b>TOTAL</b>		<b>\$39,268,846</b>		<b>\$38,253,980</b>		<b>\$36,801,620</b>		<b>\$36,313,995</b>
USU	Perkins Loan	1,090	\$2,613,171	872	\$1,944,077	526	\$1,394,947	728	\$2,001,043
	FWS	483	\$1,314,513	476	1,349,729	472	1,472,229	449	\$1,393,467
	FSEOG	1,359	\$952,393	1,332	922,388	1,167	921,088	1,317	\$920,956
	LEAP		*		*		*		*
	Pell	10,212	\$37,608,539	10,179	\$37,057,695	10,239	\$38,010,193	9,980	\$37,407,946
	<b>TOTAL</b>		<b>\$41,273,889</b>		<b>\$41,798,457</b>		<b>\$41,723,412</b>		<b>\$41,723,412</b>
WSU	Perkins Loan	231	\$789,032	432	\$1,283,714	299	\$878,493	421	\$1,415,839
	FWS	381	\$1,089,337	352	1,095,304	342	1,153,919	343	\$850,052
	FSEOG	1,355	\$670,839	1,118	596,426	791	513,717	741	\$506,353
	LEAP		*		*		*		*
	Pell	9,098	\$30,895,461	8,334	\$28,814,605	8,027	\$28,716,432	7,462	\$26,329,799
	<b>TOTAL</b>		<b>\$33,444,669</b>		<b>\$31,790,049</b>		<b>\$31,262,561</b>		<b>\$29,102,043</b>
SUU	Perkins Loan	111	\$343,323	127	\$433,500	100	\$335,011	52	\$246,471
	FWS	212	\$284,348	194	278,050	198	284,347	178	\$28,438
	FSEOG	545	\$198,604	556	192,091	560	195,348	517	\$195,348
	LEAP		*		*		*		*
	Pell	3,229	\$12,842,204	3,115	\$12,236,999	3,050	\$12,162,526	2,950	\$11,967,705
	<b>TOTAL</b>		<b>\$13,668,479</b>		<b>\$13,140,640</b>		<b>\$12,977,232</b>		<b>\$12,437,962</b>
SNOW	Perkins Loan	0	\$0	0	0	0	0		
	FWS	82	\$96,504	83	120,900	90	114,394	110	\$154,397
	FSEOG	305	\$109,524	213	109,788	236	118,404	151	\$77,731
	LEAP		*		*		*		*
	Pell	1,600	\$5,822,523	1,518	\$6,596,082	1,639	\$6,051,331	1,617	\$6,211,599
	<b>TOTAL</b>		<b>\$6,028,551</b>		<b>\$6,826,770</b>		<b>\$6,284,129</b>		<b>\$6,443,727</b>
DSU	Perkins Loan	60	\$210,000	88	\$284,315	95	\$278,618	47	\$235,535
	FWS	102	\$254,323	118	315,977	111	301,110	117	\$305,284
	FSEOG	395	\$230,715	492	251,648	437	220,119	346	\$174,716
	LEAP		*		*		*		*
	Pell	4,971	\$17,742,978	4,638	\$16,734,247	4,483	\$15,924,152	3,880	\$14,147,361
	<b>TOTAL</b>		<b>\$18,438,016</b>		<b>\$17,586,187</b>		<b>\$16,723,999</b>		<b>\$14,862,896</b>
CEU	Perkins Loan	**	**	**	**	**	**	**	**
	FWS	**	**	**	**	**	**	**	**
	FSEOG	**	**	**	**	**	**	**	**
	LEAP	*	*	*	*	*	*	*	*
	Pell	**	**	**	**	**	**	**	**
	<b>TOTAL</b>		<b>\$0</b>		<b>\$0</b>		<b>\$0</b>		<b>\$0</b>
UVU	Perkins Loan	58	\$150,500	93	\$327,632	122	\$447,381	74	\$338,260
	FWS	235	\$712,765	333	818,482	154	432,369	195	\$591,971
	FSEOG	2,669	\$785,200	1,991	734,973	1,706	987,152	1,974	\$737,857
	LEAP		*		*		*		*
	Pell	14,908	\$52,403,553	13,463	\$47,703,090	0	\$47,199,077	13,148	\$45,293,943
	<b>TOTAL</b>		<b>\$54,052,018</b>		<b>\$49,584,177</b>		<b>\$49,065,979</b>		<b>\$46,962,031</b>
SLCC	Perkins Loan	276	\$529,256	394	\$694,097	306	\$697,540	157	\$353,182
	FWS	142	\$441,627	163	489,487	233	614,149	187	\$580,968
	FSEOG	479	\$3,698,900	725	630,583	856	731,871	749	\$662,618
	LEAP		*		*		*		*
	Pell	14,188	\$41,499,839	13,518	\$39,344,122	12,019	\$34,523,919	9,668	\$28,851,255
	<b>TOTAL</b>		<b>\$46,169,622</b>		<b>\$41,158,289</b>		<b>\$36,567,479</b>		<b>\$30,448,022</b>
TOTAL	Perkins Loan	3,613	\$8,682,606	3,956	\$9,100,651	3,336	\$8,305,870	4,017	\$9,113,203
USHE	FWS	2,028	\$5,554,313	2,132	\$5,901,740	1,997	\$5,640,698	1,979	\$5,101,064
	FSEOG	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
	Pell	67,123	\$231,615,145	63,133	\$219,978,296	47,413	\$212,591,087	56,365	\$199,492,841
	<b>TOTAL</b>		<b>\$253,558,817</b>		<b>\$239,613,981</b>		<b>\$231,481,456</b>		<b>\$218,294,089</b>

## Notes:

(1) Perkins Loan, PELL, FWS, FSEOG expenditures compiled from Institutional FISAPs as of June 30 of AY 16-17.

(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 has been retired.

#### **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**

	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Veterinary Medicine # of Awards	30	29	28	25	22	17	11	5	0	0
\$ Amount	\$657,500	\$652,800	\$660,350	\$654,750	\$575,050	\$435,000	\$321,300	\$156,500	\$0	\$0
Optometry # of Awards	10	8	7	7	9	12	15	20	25	26
\$ Amount	\$141,000	\$116,800	\$105,700	\$109,200	\$142,200	\$193,200	\$246,000	\$336,000	\$427,500	\$460,850
Podiatry # of Awards	4	4	2	4	3	7	10	16	18	13
\$ Amount	\$49,200	\$50,800	\$26,200	\$54,000	\$41,100	\$97,300	\$142,000	\$232,000	\$251,090	\$198,575
Administrative Fee # of Awards	116,000	120,000	124,800	125,000	125,000	131,000	131,000	\$137,000	\$141,000	\$149,000
TOTAL # of Awards	44	41	37	36	34	36	36	41	43	39
\$ Amount	\$963,700	\$940,400	\$917,050	\$942,950	\$883,350	\$856,500	\$840,300	\$861,500	\$819,590	\$808,425

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

	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	50	50	50
\$ Amount	\$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 assisted Utah students to obtain training in dentistry through a contract with Creighton University. Program ended in 2016-17 with the opening of the U of Utah School of Dentistry.

Table 6

USHE Terrel H. Bell Teaching Incentive Loan (TIL)<sup>(1)</sup>

2011-12 through 2016-17

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	\$43,464	279	\$763,109	179	\$470,198	184	\$507,485	660	401	\$1,784,257
2016-17	145	\$370,052	310	\$892,120	224	\$663,659	90	\$205,290	769	445	\$2,131,120
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	0	\$0	0	\$0	0	\$0	0	0	\$0
2016-17	0	\$0	0	\$0	0	\$0	0	\$0	0	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	0	\$0	0	\$0	0	\$0	0	0	\$0
2016-17	0	\$0	0	\$0	0	\$0	0	\$0	0	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	\$43,464	279	\$763,109	179	\$470,198	184	\$507,485	660	401	\$1,784,257
2016-17	145	\$370,052	310	\$892,120	224	\$663,659	90	\$205,290	769	445	\$2,131,120
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
2016-17										\$90,567	\$2,221,687

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 2016-17  
 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--2015						
Institution	Associate	Bachelor	Master	Doctoral	Formula	Percent
University of Utah	0	583	365	100	3562	40.18%
Utah State University	9	340	145	35	1843	20.79%
Weber State University	134	283	0	0	1400	15.79%
Southern Utah University	15	51	0	0	234	2.64%
Snow College	58	0	0	0	116	1.31%
Dixie State University	1	36	0	0	146	1.65%
Utah Valley University	111	221	0	0	1106	12.48%
Salt Lake Community College	229	0	0	0	458	5.17%
Total	557	1,514	510	135	8865	100%

Scholarship Funds Available for FY 2016-17: \$38,400  
 Carry-Over from Previous Years: \$0  
 Total Available for Allocation: \$38,400

Institution	Scholarship Share	Amount Disbursed	Students Awarded
University of Utah	\$ 15,429	\$ 17,500	10
Utah State University	\$ 7,983	\$ -	0
Weber State University	\$ 6,064	\$ 23,436	21
Southern Utah University	\$ 1,014	\$ -	0
Snow College	\$ 502	\$ 502	1
Dixie State University	\$ 632	\$ 632	1
Utah Valley University	\$ 4,791	\$ 4,791	6
Salt Lake Community College	\$ 1,984	\$ -	0
Total	\$ 38,400	\$ 46,861	39

Table 8

## USHE Educationally Disadvantaged Programs

<i>Utilization of Funds for Eligible Purposes</i>				<i>Scholarship Measures</i>			
Expenditure Category	2015-16	2016-17	Budget 2017-18	Measure	2015-16	2016-17	Budget 2017-18
<b>University of Utah</b>				<b>University of Utah</b>			
Scholarships - General	\$155,932	\$187,251	\$175,959	Students receiving general scholarships	210	223	247
Scholarships - Minority Students	68,457	82,207	77,250	Average per student	\$743	\$782	\$758
Tutoring	69,405	83,345	78,319	Minority students receiving scholarships	91	98	106
Counseling	364,375	437,559	411,172	Average per minority student	\$752	\$781	\$776
Total Expenditures	\$658,169	\$790,362	\$742,700				
<b>Utah State University</b>				<b>Utah State University</b>			
Scholarships - General	\$0	\$8,389	\$4,400	Students receiving general scholarships	0	0	1
Scholarships - Minority Students	88,042	83,222	83,600	Average per student	\$0	\$0	\$8,389
Tutoring	11,991	8,389	12,000	Minority students receiving scholarships	19	20	16
Counseling	0	0	0	Average per minority student	\$4,634	\$4,400	\$5,201
Total Expenditures	\$100,033	\$100,000	\$100,000				
<b>Weber State University</b>				<b>Weber State University</b>			
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	15,088	6,338	15,088	Minority students receiving scholarships	n/a	n/a	n/a
Counseling/Other scholarship	330,212	341,281	365,112	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$345,300	\$347,620	\$380,200				
<b>Southern Utah University</b>				<b>Southern Utah University</b>			
Scholarships - General	\$31,193	\$31,758	\$28,250	Students receiving general scholarships	38	30	39
Scholarships - Minority Students	19,900	9,900	18,000	Average per student	\$821	\$808	\$814
Tutoring	0	0	0	Minority students receiving scholarships	26	24	19
Counseling	50,523	51,674	48,450	Average per minority student	\$765	\$917	\$521
Total Expenditures	\$101,616	\$93,332	\$94,700				
<b>Snow College</b>				<b>Snow College</b>			
Scholarships - General	\$32,000	\$32,000	\$32,000	Students receiving general scholarships	88	80	100
Scholarships - Minority Students	0	0	0	Average per student	\$364	\$400	\$320
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				
<b>Dixie State University</b>				<b>Dixie State University</b>			
Scholarships - General	\$1,700	\$0	\$0	Students receiving general scholarships	1	0	0
Scholarships - Minority Students	23,800	25,500	25,500	Average per student	\$1,700	\$0	\$0
Tutoring	0	0	0	Minority students receiving scholarships	19	20	23
Counseling	0	0	0	Average per minority student	\$1,253	\$1,275	\$1,109
Total Expenditures	\$25,500	\$25,500	\$25,500				
<b>Utah Valley University</b>				<b>Utah Valley University</b>			
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	23,317	30,725	22,209	Minority students receiving scholarships	n/a	n/a	n/a
Counseling	143,183	148,073	152,691	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$166,500	\$178,798	\$174,900				
<b>Salt Lake Community College</b>				<b>Salt Lake Community College</b>			
Scholarships - General	\$395,912	\$141,229	\$178,400	Students receiving general scholarships	355	200	172
Scholarships - Minority Students	0	0	0	Average per student	\$1,115	\$892	\$821
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$395,912	\$141,229	\$178,400				
<b>Utah System of Higher Education</b>				<b>Utah System of Higher Education</b>			
Scholarships - General	\$716,737	\$500,627	\$519,009	Students receiving general scholarships	692	533	559
Scholarships - Minority Students	\$200,199	\$200,829	\$204,350	Average per student	\$1,036	\$939.26	\$928.46
Tutoring	\$119,801	\$128,797	\$127,616	Minority students receiving scholarships	155	162	164
Counseling/Other scholarship	\$893,293	\$983,587	\$982,425	Average per minority student	\$1,292	\$1,240	\$1,246
Total Expenditures	\$1,930,030	\$1,813,841	\$1,833,400				

## VI. STATUTORY TUITION WAIVERS

Table 9

### USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Resident Tuition Waivers</b>				
<b>Resident 10% Meritorious/Impecunious</b>				
UU	\$9,533,772	\$9,794,787	\$9,322,153	\$10,107,338
USU	6,803,868	7,094,309	7,532,780	8,360,875
WSU	5,567,997	6,165,318	6,665,314	6,842,146
SUU	2,837,425	2,887,638	3,158,621	3,285,109
Snow	899,840	989,632	1,137,933	1,044,012
DSU	2,015,629	2,086,909	2,121,025	2,249,875
UVU	6,111,436	6,681,297	7,740,608	9,091,084
SLCC	2,007,869	2,007,960	2,427,318	2,326,410
<b>Subtotal</b>	<b>\$35,777,836</b>	<b>\$37,707,850</b>	<b>\$40,105,752</b>	<b>\$43,306,849</b>
<b>Resident National Guard Waivers Set-aside</b>				
UU	\$153,081	\$163,079	\$175,717	\$194,276
USU	109,574	166,843	245,255	250,065
WSU	66,548	126,241	138,078	141,597
SUU	54,684	70,116	73,303	73,699
Snow	6,580	2,998	10,808	12,784
DSU	9,620	29,388	37,126	53,346
UVU	86,016	143,769	139,800	213,520
SLCC	19,006	21,286	37,030	24,289
<b>Subtotal</b>	<b>\$505,109</b>	<b>\$723,720</b>	<b>\$857,117</b>	<b>\$963,576</b>
<b>Critical Occupations</b>				
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
<b>Subtotal</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Senior Citizens</b>				
UU	\$1,135,246	\$1,425,886	\$1,775,364	\$1,926,148
USU	6,326	10,874	3,461	12,320
WSU	167,859	0	143,625	154,229
SUU	0	0	0	0
Snow	0	0	0	0
DSU	59,315	64,196	81,992	85,317
UVU	110,737	111,888	125,304	118,558
SLCC	124,614	177,620	59,193	226,995
<b>Subtotal</b>	<b>\$1,604,098</b>	<b>\$1,790,464</b>	<b>\$2,188,939</b>	<b>\$2,523,567</b>



Table 9

USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Police or Firefighter Survivor</b>				
UU	\$0	\$0	\$0	\$0
USU	1,376	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	0	2,314
DSU	948	5,688	1,954	0
UVU	1,176	0	0	0
SLCC	1,463	0	0	0
<b>Subtotal</b>	<b>\$4,963</b>	<b>\$5,688</b>	<b>\$1,954</b>	<b>\$2,314</b>
<b>Wards of the State</b>				
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
<b>Subtotal</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Public School Teachers</b>				
UU	\$133,673	\$52,252	\$23,640	\$45,920
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
<b>Subtotal</b>	<b>\$133,673</b>	<b>\$52,252</b>	<b>\$23,640</b>	<b>\$45,920</b>
<b>Sequential Mandarin Chinese</b>				
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
<b>Subtotal</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

Table 9

USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Purple Heart Waiver</b>				
UU	\$62,304	\$59,086	\$24,802	\$36,138
USU	44,093	51,278	20,755	32,393
WSU	26,825	19,552	26,293	26,303
SUU	15,142	13,032	7,381	17,322
Snow	0	0	0	3,196
DSU	9,120	14,062	9,933	7,181
UVU	28,401	33,599	27,004	14,027
SLCC	20,573	14,196	9,126	8,887
<b>Subtotal</b>	<b>\$206,458</b>	<b>\$204,805</b>	<b>\$125,294</b>	<b>\$145,447</b>
<b>Scott B. Lundell-Fallen Soldiers' Dependants Waiver</b>				
UU	\$3,256	\$0	\$0	\$22,641
USU	4,548	4,639	0	25,988
WSU	1,943	0	11,217	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	5,970	7,562	7,736	0
SLCC	0	4,559	779	2,967
<b>Subtotal</b>	<b>\$15,716</b>	<b>\$16,760</b>	<b>\$19,732</b>	<b>\$51,596</b>
<b>Athletic Waivers- Residents</b>				
UU	\$641,716	\$717,766	\$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	1,117,385	649,277	0	0
SLCC	132,188	140,820	0	0
<b>Subtotal</b>	<b>\$1,891,289</b>	<b>\$1,507,863</b>	<b>\$0</b>	<b>\$0</b>
<b>Total Resident Waivers</b>				
UU	11,663,049	12,212,856	11,321,676	12,332,461
USU	6,969,785	7,327,943	7,802,251	8,681,641
WSU	5,831,172	6,311,111	6,984,527	7,164,275
SUU	2,907,251	2,970,786	3,239,305	3,376,130
Snow	906,420	992,630	1,148,741	1,062,306
DSU	2,094,632	2,200,243	2,252,030	2,395,719
UVU	7,461,121	7,627,392	8,040,452	9,437,189
SLCC	2,305,713	2,366,441	2,533,446	2,589,548
<b>Total Resident</b>	<b>\$40,139,142</b>	<b>\$42,009,402</b>	<b>\$43,322,428</b>	<b>\$47,039,269</b>

Table 9

USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Nonresident Tuition Waivers</b>				
<b>Meritorious Nonresident Undergraduate</b>				
UU	\$690,984	\$2,800,294	\$6,454,437	\$7,359,426
USU	7,513,221	7,593,534	9,248,083	8,327,507
WSU	2,055,238	2,272,869	2,561,714	2,720,926
SUU	1,306,893	1,955,717	5,014,564	6,642,732
Snow	213,559	645,498	671,652	537,060
DSU	312,592	336,862	270,695	298,745
UVU	2,477,996	4,082,754	5,621,363	5,271,360
SLCC	38,552	22,489	30,701	16,075
<b>Subtotal</b>	<b>\$14,609,036</b>	<b>\$19,710,017</b>	<b>\$29,873,209</b>	<b>\$31,173,831</b>
<b>Meritorious Nonresident Graduate Waivers</b>				
UU	\$0	\$0	\$0	\$0
USU	2,761,094	3,691,291	3,898,004	3,778,644
WSU	476,068	524,251	594,213	493,348
SUU	0	0	75,486	73,290
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	0	350,880
SLCC	0	0	0	0
<b>Subtotal</b>	<b>\$3,237,162</b>	<b>\$4,215,542</b>	<b>\$4,567,703</b>	<b>\$4,696,162</b>
<b>WICHE / WUE</b>				
UU	\$2,829,641	\$2,989,399	\$2,267,986	\$3,726,441
USU	960,990	1,155,815	1,339,460	1,437,531
WSU	634,256	631,299	663,562	629,980
SUU	1,184,315	2,378,679	2,747,631	3,720,811
Snow	91,290	145,260	134,290	181,778
DSU	426,056	704,304	977,275	1,823,886
UVU	1,564,110	2,293,875	3,611,254	4,074,018
SLCC	178,303	181,138	178,598	248,777
<b>Subtotal</b>	<b>\$7,868,961</b>	<b>\$10,479,769</b>	<b>\$11,920,056</b>	<b>\$15,843,222</b>
<b>Reciprocal Agreements</b>				
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	292,584	272,956	210,357	151,383
UVU	0	0	0	0
SLCC	0	0	0	0
<b>Subtotal</b>	<b>\$292,584</b>	<b>\$272,956</b>	<b>\$210,357</b>	<b>\$151,383</b>
<b>Border Waivers</b>				
UU	\$45,222	\$53,824	\$0	\$57,377
USU	19,383	23,178	6,858	0
WSU	16,642	8,654	6,320	0
SUU	32,173	8,247	2,789	2,500
Snow	0	0	0	0
DSU	124,632	142,728	77,491	75,216
UVU	0	0	9,816	0
SLCC	0	0	0	0
<b>Subtotal</b>	<b>\$238,052</b>	<b>\$236,631</b>	<b>\$103,274</b>	<b>\$135,093</b>

Table 9

USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Certain Utah High School Graduates- Undocumented</b>				
UU	\$824,475	\$907,728	\$1,055,793	\$1,048,290
USU	183,972	242,078	278,426	268,093
WSU	427,325	468,399	525,223	632,445
SUU	70,736	93,435	126,505	209,684
Snow	0	0	0	0
DSU	0	0	0	0
UVU	1,226,824	1,406,934	1,488,840	1,714,680
SLCC	1,640,874	1,750,716	2,068,144	1,648,561
Subtotal	\$4,374,206	\$4,869,290	\$5,542,931	\$5,521,753
<b>Certain Utah High School Graduates-Foreign Nationals</b>				
UU	\$440,535	\$487,766	\$570,878	\$680,598
USU	78,734	84,367	100,055	142,140
WSU	33,454	21,881	118,503	82,419
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	124,292	156,907	183,748	243,278
SLCC	68,896	61,902	72,172	79,708
Subtotal	\$745,911	\$812,823	\$1,045,356	\$1,228,143
<b>Nonresident Transition Waivers</b>				
UU	\$457,841	\$205,016	\$196,219	\$390,401
USU	391,527	20,514	0	0
WSU	0	0	0	0
SUU	518,500	293,798	944,981	542,083
Snow	0	0	0	0
DSU	1,983,859	2,570,621	3,078,379	3,671,131
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$3,351,726	\$3,089,949	\$4,219,579	\$4,603,615
<b>Athletic Waivers- Non-Residents</b>				
UU	\$0	\$0	\$665,019	\$674,520
USU	1,428,300	1,713,091	1,753,427	1,743,488
WSU	1,226,655	1,283,475	1,323,522	1,369,839
SUU	772,723	819,025	844,000	845,406
Snow	431,764	353,105	323,973	347,070
DSU	198,288	205,030	243,842	239,749
UVU	0	641,309	1,482,284	887,539
SLCC	274,459	240,560	161,250	242,940
Subtotal	\$4,332,189	\$5,255,595	\$6,797,317	\$6,350,550

Table 9

USHE Statutory Tuition Waivers <sup>(1)</sup>

	2013-14	2014-15	2015-16	2016-17
<b>Alumni Legacy Scholarship</b>				
UU	\$52,500	\$135,000	\$178,500	\$226,500
USU	9,902,082	12,892,845	17,148,770	19,756,313
WSU	414,679	333,171	386,634	525,304
SUU	207,792	259,739	279,150	373,032
Snow	0	0	0	199,233
DSU	228,288	240,936	232,158	256,939
UVU	0	0	0	20,320
SLCC	0	0	0	0
<b>Subtotal</b>	<b>\$10,805,342</b>	<b>\$13,861,691</b>	<b>\$18,225,212</b>	<b>\$21,357,640</b>
<b>Total Non-Resident Waivers</b>				
UU	\$5,341,199	\$7,579,027	\$11,388,832	\$14,163,553
USU	23,239,304	27,416,713	33,773,083	35,453,716
WSU	5,284,318	5,543,999	6,179,691	6,454,261
SUU	4,093,132	5,808,640	10,035,106	12,409,537
Snow	736,613	1,143,863	1,129,915	1,265,141
DSU	3,566,299	4,473,437	5,090,197	6,517,048
UVU	5,393,222	8,581,779	12,397,305	12,562,075
SLCC	2,201,084	2,256,805	2,510,865	2,236,060
<b>Total Non-Resident</b>	<b>\$49,855,170</b>	<b>\$62,804,263</b>	<b>\$82,504,994</b>	<b>\$91,061,391</b>
<b>Total Waivers (Resident and Nonresident)</b>				
UU	\$17,004,247	\$19,791,883	\$22,710,508	\$26,496,014
USU	\$30,209,088	\$34,744,656	\$41,575,334	\$44,135,357
WSU	\$11,115,490	\$11,855,110	\$13,164,218	\$13,618,536
SUU	\$7,000,383	\$8,779,426	\$13,274,411	\$15,785,667
Snow	\$1,643,033	\$2,136,493	\$2,278,656	\$2,327,447
DSU	\$5,660,931	\$6,673,680	\$7,342,227	\$8,912,767
UVU	\$12,854,343	\$16,209,170	\$20,437,757	\$21,999,264
SLCC	\$4,506,797	\$4,623,246	\$5,044,311	\$4,825,608
<b>Total Waivers</b>	<b>\$89,994,312</b>	<b>\$104,813,664</b>	<b>\$125,827,422</b>	<b>\$138,100,660</b>

V. TUITION SET ASIDES FOR NEED-BASED FINANCIAL AID

Table 10

USHE First Tier Tuition Set Aside for Financial Aid

<i>Utilization of Funds for Eligible Purposes</i>			<i>Productivity Measures</i>				
Expenditure Category	2016-17	Budget 2017-18	Measure	2016-17		Budget 2017-18	
				Number	Average Amount	Number	Average Amount
<b>University of Utah</b>			<b>University of Utah</b>				
Need-based Grants	\$1,975,896	\$1,975,900	Students Receiving Need-based Grants	2,655	\$744	2,470	\$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*	63	\$3,073	62	\$3,226
Other housing stipends	193,600	200,000	Total Receiving Need-based Aid	2,718	\$798	2,532	\$859
<b>Total Expenditures</b>	<b>\$2,169,496</b>	<b>\$2,175,900</b>					
<b>Utah State University</b>			<b>Utah State University</b>				
Need-based Grants	\$278,000	\$637,000	Students Receiving Need-based Grants	110	\$2,527	375	\$1,699
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*	415	\$819	0	\$0
Other- Undergrad. Teaching Fellows	339,700	0	Total Receiving Need-based Aid	525	\$1,177	375	\$1,699
<b>Total Expenditures</b>	<b>\$617,700</b>	<b>\$637,000</b>					
<b>Weber State University</b>			<b>Weber State University</b>				
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*	353	\$1,326	360	\$1,309
Need Based Other	468,086	471,299	Total Receiving Need-based Aid	353	\$1,326	360	\$1,309
<b>Total Expenditures</b>	<b>\$468,086</b>	<b>\$471,299</b>					
<b>Southern Utah University</b>			<b>Southern Utah University</b>				
Need-based Grants	\$340,666	\$276,500	Students Receiving Need-based Grants	59	\$5,774	50	\$5,530
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	59	\$5,774	50	\$5,530
<b>Total Expenditures</b>	<b>\$340,666</b>	<b>\$276,500</b>					
<b>Snow College</b>			<b>Snow College</b>				
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*	132	\$3,030	130	\$3,077
Need Based Other	400,000	400,000	Total Receiving Need-based Aid	132	\$3,030	130	\$3,077
<b>Total Expenditures</b>	<b>\$400,000</b>	<b>\$400,000</b>					
<b>Dixie State University</b>			<b>Dixie State University</b>				
Need-based Grants	\$20,025	\$20,025	Students Receiving Need-based Grants	7	\$2,861	10	\$2,003
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	7	\$2,861	10	\$2,003
<b>Total Expenditures</b>	<b>\$20,025</b>	<b>\$20,025</b>					
<b>Utah Valley University</b>			<b>Utah Valley University</b>				
Need-based Grants	\$379,217	\$400,000	Students Receiving Need-based Grants	254	\$1,493	400	\$1,000
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	254	\$1,493	400	\$1,000
<b>Total Expenditures</b>	<b>\$379,217</b>	<b>\$400,000</b>					
<b>Salt Lake Community College</b>			<b>Salt Lake Community College</b>				
Need-based Grants	\$213,700	\$213,700	Students Receiving Need-based Grants	250	\$855	250	\$855
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	250	\$855	250	\$855
<b>Total Expenditures</b>	<b>\$213,700</b>	<b>\$213,700</b>					
<b>Utah System of Higher Education</b>			<b>Utah System of Higher Education</b>				
Need-based Grants	\$3,207,504	\$3,523,125	Students Receiving Need-based Grants	3,335	\$961.77	3,555	\$991.03
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	963	\$1,455	552	\$1,941
2nd-Tier Tuition Based Scholarships	1,401,386	1,071,299	Total Receiving Need-based Aid	4,298	\$1,072.33	4,107	\$1,118.68
<b>Total Expenditures</b>	<b>\$4,608,890</b>	<b>\$4,594,424</b>					

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