

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:

- 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 Aside for Need-Based Financial Aid

I. STATE STUDENT FINANCIAL ACCESS PROGRAMS

INTRODUCTION

The following tables provide statistical information my529 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.

MY529

About my529

my529 (formerly the Utah Educational Savings Plan) is a nonprofit 529 educational savings plan, authorized by the Utah Legislature in 1996 and designed to comply with Section 529 of the Internal Revenue Code. my529 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 529 college savings plan, my529 is dedicated to helping families invest for college. my529 does not sell additional products or services, such as retirement plans or insurance.

Tax Advantages

- Earnings on investments in my529 accounts grow tax-deferred from federal and Utah state income taxes. Withdrawals are tax-free when used for qualified higher education expenses.
- Utah taxpayer account owners and trusts may claim up to 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 my529 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 my529 account must be designated as such before age 19.

Use of Funds

- Money in a my529 account may be used for a beneficiary's qualified higher education expenses, including:
 - tuition and fees
 - required books, supplies, and equipment
 - computers, software, and internet access
 - certain room and board costs

- my529 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

- my529 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 and U.S. physical address.
- A beneficiary may be changed at any time to another member of the beneficiary's family.
- my529 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 my529 offers:

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

my529 is a low-cost leader in the 529 plan industry. my529 charges no fees to Utah residents who select the Public Treasurers' Investment Fund investment option.

For more information about my529 or to request a copy of the Program Description, visit my529.org, call 800.418.2551 toll-free, or send an email to info@my529.org.

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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. For a copy of the Program Description, call 800.418.2551 or visit my529.org.

Investments in my529 are not insured or guaranteed by my529, 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 my529. You should consider such benefits, if any, before investing in my529.

my529 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 undergraduate 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, LDS Business College, Western Governors University, Westminster College, and the Utah System of Technical Colleges (USTC) participate in HESSP.

VETERANS TUITION GAP PROGRAM (VeT GAP)

The Veterans Tuition Gap Program (VeT Gap) is a State supplement grant to provide tuition assistance for veterans who are attending institutions of higher education in Utah and whose benefits under the federal program have been exhausted or are not available. This program is only available to public and private, non-profit higher education institutions in Utah 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 a participating school has graduated in the last year as a ratio to the total for all participating schools.

Table 1

my529 (formerly UESP)
Number of Accounts and Total Assets by Fiscal Year

Fiscal Year Ending June 30	Number of Accounts	Total Assets (in thousands)
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
2018	371,651	\$12,634,000

Table 2

Higher Education Success Stipend Program (HESSP)
Fiscal Year Ending June 30, 2018

Institution	Grant Award		Work Study Award		Administrative Expense	Total Expended
	#	\$	#	\$	\$	\$
U of U	399	298,885	0	0	9,237	308,122
USU	431	430,468	0	0	11,364	441,832
WSU	154	275,928	0	0	0	275,928
SUU	145	53,670	40	54,987	0	108,657
SNOW	103	64,847	0	0	1,980	66,827
DSU	1	10	53	136,723	2,867	139,600
UVU	587	453,500	0	0	14,000	467,500
SLCC	374	308,155	0	0	6,420	314,575
TOTAL USHE	2,194	\$ 1,885,463	93	\$ 191,710	\$ 45,868	\$ 2,123,041
BYU	89	188,169	0	0	0	188,169
LDSBC	25	17,400	0	0	0	17,400
WESTMINSTER	9	19,500	0	0	0	19,500
WGU	47	85,800	0	0	0	85,800
TOTAL PRIVATE	170	\$ 310,869	0	\$ -	\$ -	\$ 310,869
USTC*		\$ 57,531			\$ 465	\$ 57,996
FINAL TOTALS	2,364	\$ 2,253,863	93	\$ 191,710	\$ 46,333	\$ 2,491,906

Notes:

(1) HESSP data is compiled from annual reports provided by the participating institutions for the 2018 award year.

* USTC was formerly known as UCAT.

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

Fiscal Year Ending June 30, 2018

Institution	Awards		Administrative Expense	Total Expended
	#	\$	\$	\$
University of Utah	12	50,365	2,925	53,290
Utah State University	3	12,101	0	12,101
Weber State University	5	12,779	0	12,779
Southern Utah University	5	12,943	0	12,943
Dixie State University	1	2,154	0	2,154
Utah Valley University	7	21,807	2,586	24,393
TOTAL USHE	33	\$ 112,149	\$ 5,511	\$ 117,660
Embry Riddle Aeronautical University	0	0	0	0
Park University - Hill AFB Campus	0	0	0	0
Western Governors University	2	5,900	0	5,900
Westminster College	1	10,000	0	10,000
TOTAL PRIVATE NOT-FOR-PROFIT	3	\$ 15,900	\$ -	\$ 15,900
FINAL TOTALS	36	\$ 128,049	\$ 5,511	\$ 133,560

Notes:

(1) VeT Gap data is compiled from annual reports provided by the participating institutions for the 2018 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 2018-2019 award year the maximum grant amount is scheduled at \$6,095.

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 25 percent of total funds.

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2008-09		2009-2010		2010-11		2011-12		2012-13		
	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	1,089	\$2,518,406	1,485	\$3,273,659	1,342	\$3,056,533	1,849	\$4,145,697	1,787	\$4,047,324
	FWS	390	\$1,263,064	447	\$1,617,816	425	\$1,442,206	405	\$1,407,502	391	\$1,360,896
	FSEOG	3,006	\$1,078,773	1,607	\$1,172,474	1,302	\$970,204	1,250	\$936,876	1,424	\$1,060,578
	LEAP	1,206	\$421,280	583	\$406,620	574	\$411,600	-	-	-	-
	Pell	4,882	\$13,663,216	6,204	\$21,110,783	7,986	\$30,596,971	8,880	\$32,232,699	8,917	\$32,800,048
	TOTAL		\$18,944,739		\$27,581,352		\$36,477,514		\$38,722,774		\$39,268,846
USU	Perkins Loan	319	\$873,418	434	\$1,181,471	797	\$2,153,545	803	\$1,854,836	1,090	\$2,613,171
	FWS	698	\$1,728,761	594	\$1,601,487	407	\$1,091,096	383	\$1,291,454	483	\$1,314,513
	FSEOG	1,023	\$854,960	1,041	\$828,376	2,442	\$826,261	1,360	\$919,379	1,359	\$952,393
	LEAP	313	\$275,800	328	\$304,000	393	\$308,000	-	-	-	-
	Pell	5,798	\$17,188,871	7,358	\$27,028,704	8,816	\$33,286,071	10,500	\$36,913,317	10,212	\$37,608,539
	TOTAL		\$20,921,810		\$30,944,038		\$37,664,973		\$40,978,986		
WSU	Perkins Loan	509	\$1,622,388	444	\$1,405,161	356	\$1,016,561	65	\$177,437	231	\$789,032
	FWS	317	\$799,795	448	\$1,258,640	261	\$836,390	327	\$990,407	381	\$1,089,337
	FSEOG	1,072	\$946,562	659	\$566,285	669	\$590,858	959	\$670,513	1,355	\$670,839
	LEAP	262	\$225,200	312	\$244,500	270	\$247,400	-	-	-	-
	Pell	4,654	\$12,174,809	6,404	\$21,823,012	8,143	\$29,042,257	8,591	\$29,421,332	9,098	\$30,895,461
	TOTAL		\$15,768,754		\$25,297,598		\$31,733,466		\$31,259,689		\$33,444,669
SUU	Perkins Loan	62	\$186,911	75	\$195,938	87	\$268,826	88	\$253,700	111	\$343,323
	FWS	232	\$284,371	236	\$284,348	212	\$284,348	225	\$284,348	212	\$284,348
	FSEOG	603	\$194,998	570	\$185,448	499	\$195,348	457	\$195,348	545	\$198,604
	LEAP	172	\$91,200	130	\$90,672	199	\$109,700	-	-	-	-
	Pell	2,265	\$7,029,574	2,952	\$11,734,843	3,499	\$14,188,315	3,343	\$12,923,168	3,229	\$12,842,204
	TOTAL		\$7,787,054		\$12,491,249		\$15,046,537		\$13,656,564		\$13,668,479
SNOW	Perkins Loan	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
	FWS	119	\$127,613	114	\$124,718	87	\$110,835	74	\$95,191	82	\$96,504
	FSEOG	314	\$109,524	301	\$109,524	338	\$109,524	349	\$136,528	305	\$109,524
	LEAP	108	\$45,400	154	\$47,000	141	\$47,740	-	-	-	-
	Pell	863	\$2,436,725	1,276	\$4,658,083	1,607	\$6,103,966	1,626	\$5,915,921	1,600	\$5,822,523
	TOTAL		\$2,719,262		\$4,939,325		\$6,372,065		\$6,147,640		\$6,028,551
DSU	Perkins Loan	102	\$339,374	68	\$246,392	92	\$293,000	55	\$203,375	60	\$210,000
	FWS	65	\$213,858	86	\$202,185	101	\$247,091	107	\$285,363	102	\$254,323
	FSEOG	434	\$134,591	336	\$138,967	536	\$118,092	309	\$161,250	395	\$230,715
	LEAP	107	\$62,700	124	\$69,500	124	\$80,300	-	-	-	-
	Pell	2,373	\$6,538,252	4,103	\$14,558,351	5,207	\$19,773,229	5,594	\$19,280,928	4,971	\$17,742,978
	TOTAL		\$7,288,775		\$15,215,395		\$20,511,712		\$19,930,916		\$18,438,016
CEU	Perkins Loan	20	\$44,046	14	\$23,456	10	\$15,760	-	-	-	-
	FWS	38	\$51,741	20	\$20,283	28	\$41,363	-	-	-	-
	FSEOG	70	\$52,305	66	\$53,630	75	\$57,867	-	-	-	-
	LEAP	46	\$23,873	35	\$26,100	37	\$27,647	-	-	-	-
	Pell	621	\$1,801,539	901	\$3,204,529	1,210	\$4,392,056	-	-	-	-
	TOTAL		\$1,973,504		\$3,327,998		\$4,534,693		\$0		\$0
UVU	Perkins Loan	45	\$129,326	64	\$174,000	30	\$79,750	71	\$183,000	58	\$150,500
	FWS	283	\$807,991	179	\$715,072	407	\$1,171,133	156	\$558,488	235	\$712,765
	FSEOG	1,080	\$520,984	1,887	\$451,986	1,929	\$638,237	1,683	\$477,909	2,669	\$785,200
	LEAP	750	\$235,500	1,001	\$271,800	1,117	\$301,599	-	-	-	-
	Pell	8,205	\$22,055,335	12,007	\$42,514,124	14,800	\$56,003,580	15,821	\$55,636,977	14,908	\$52,403,553
	TOTAL		\$23,749,136		\$44,126,982		\$58,194,299		\$56,856,374		\$54,052,018
SLCC	Perkins Loan	260	\$603,173	305	\$605,934	297	\$547,427	303	\$562,585	276	\$529,256
	FWS	190	\$431,758	198	\$475,283	182	\$467,189	141	\$393,290	142	\$441,627
	FSEOG	449	\$365,825	504	\$378,562	510	\$588,206	643	\$532,942	479	\$3,698,900
	LEAP	328	\$282,700	350	\$318,800	412	\$323,600	-	-	-	-
	Pell	6,427	\$14,617,064	10,807	\$32,212,720	13,238	\$41,472,610	14,547	\$42,324,972	14,188	\$41,499,839
	TOTAL		\$16,300,520		\$33,991,299		\$43,399,032		\$43,813,789		\$46,169,622
TOTAL	Perkins Loan	2,406	\$6,317,042	2,889	\$7,106,011	3,011	\$7,431,402	3,234	\$7,380,630	3,613	\$8,682,606
USHE	FWS	2,332	\$5,708,952	2,322	\$6,299,832	2,110	\$5,691,651	1,818	\$5,020,680	2,028	\$5,554,313
	FSEOG	8,051	\$4,258,522	6,971	\$3,885,252	8,300	\$4,094,597	7,010	\$4,030,745	8,531	\$7,706,753
	LEAP	3,292	\$1,663,653	3,017	\$1,778,992	3,267	\$1,857,586	0	-	0	\$0
	Pell	36,088	\$97,505,385	52,012	\$178,845,149	64,506	\$234,859,055	68,902	\$234,649,314	67,123	\$231,615,145
	TOTAL		\$115,453,554		\$197,915,236		\$253,934,291		\$251,081,369		\$253,558,817

Table 4

USHE Federal and State Matching Student Financial Aid

Institution	2013-14		2014-15		2015-16		2016-17		2017-18		
	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	1,950	\$4,133,316	1,888	\$4,273,880	2,538	\$4,522,873	1,590	\$3,217,581	876	\$1,577,701
	FWS	413	1,433,811	397	\$1,268,181	400	\$1,196,487	384	\$1,162,806	375	\$1,084,363
	FSEOG	1,604	1,195,397	1,694	\$1,256,102	1,789	\$1,311,402	1,725	\$1,299,367	1,885	\$1,391,529
	LEAP		-		-		-		-		-
	Pell	8,368	\$31,491,456	7,956	\$30,003,457	7,660	\$29,283,233	7,124	\$27,479,452	7,486	\$31,659,484
	TOTAL		\$38,253,980		\$36,801,620		\$36,313,995		\$33,159,206		\$35,713,077
USU	Perkins Loan	872	\$1,944,077	526	\$1,394,947	728	\$2,001,043	726	\$2,052,953	348	\$1,117,445
	FWS	476	1,349,729	472	1,472,229	449	\$1,393,467	432	\$1,335,137	418	\$1,264,135
	FSEOG	1,332	922,388	1,167	921,088	1,317	\$920,956	1,113	\$777,355	1,422	\$981,505
	LEAP		-		-		-		-		-
	Pell	10,179	\$37,057,695	10,239	\$38,010,193	9,980	\$37,407,946	9,677	\$35,725,465	9,777	\$41,703,176
	TOTAL		\$41,273,889		\$41,798,457		\$41,723,412		\$39,890,910		\$45,066,261
WSU	Perkins Loan	432	\$1,283,714	299	\$878,493	421	\$1,415,839	16	\$58,000	22	\$74,562
	FWS	352	1,095,304	342	\$794,754	343	\$850,052	296	\$794,764	276	\$763,410
	FSEOG	1,118	596,426	791	513,717	741	\$506,353	1,022	\$875,082	979	\$814,557
	LEAP		-		-		-		-		-
	Pell	8,334	\$28,814,605	8,027	\$28,716,432	7,462	\$26,329,799	7,074	\$24,734,303	7,516	\$29,454,161
	TOTAL		\$31,790,049		\$31,262,561		\$29,102,043		\$26,462,149		\$31,106,690
SUU	Perkins Loan	127	\$433,500	100	\$335,011	52	\$246,471	48	\$183,404	37	\$118,196
	FWS	194	278,050	198	284,347	178	\$850,438	169	\$288,538	190	\$284,348
	FSEOG	556	192,091	560	195,348	517	\$195,348	481	\$179,870	583	\$202,902
	LEAP		-		-		-		-		-
	Pell	3,115	\$12,236,999	3,050	\$12,162,526	2,950	\$11,967,705	3,096	\$12,265,630	3,986	\$13,582,333
	TOTAL		\$13,140,640		\$12,977,232		\$12,437,962		\$12,917,442		\$14,187,779
SNOW	Perkins Loan	0	0	0	0			0	0	0	\$0
	FWS	83	120,900	90	114,394	110	\$154,397	99	\$125,055	113	\$143,818
	FSEOG	213	109,788	236	118,404	151	\$77,731	193	\$100,317	161	\$93,117
	LEAP		-		-		-		-		-
	Pell	1,518	\$6,596,082	1,639	\$6,051,331	1,617	\$6,211,599	1,696	\$6,529,622	1,755	\$7,199,410
	TOTAL		\$6,826,770		\$6,284,129		\$6,443,727		\$6,754,994		\$7,436,345
DSU	Perkins Loan	88	284,315	95	278,618	47	\$235,535	39	\$169,300	19	\$78,922
	FWS	118	315,977	111	301,110	117	\$305,284	136	\$326,581	109	\$288,968
	FSEOG	492	251,648	437	220,119	346	\$174,716	267	\$149,900	414	\$188,834
	LEAP		-		-		-		-		-
	Pell	4,638	\$16,734,247	4,483	\$15,924,152	3,880	\$14,147,361	3,893	\$14,189,850	4,080	\$16,065,933
	TOTAL		\$17,586,187		\$16,723,999		\$14,862,896		\$14,835,631		\$16,622,657
CEU	Perkins Loan	**	**	**	**	**	**	**	**	**	**
	FWS	**	**	**	**	**	**	**	**	**	**
	FSEOG	**	**	**	**	**	**	**	**	**	**
	LEAP	**	**	**	**	**	**	**	**	**	**
	Pell	**	**	**	**	**	**	**	**	**	**
	TOTAL		\$0		\$0		\$0		\$0		\$0
UVU	Perkins Loan	93	\$327,632	122	\$447,381	74	\$338,260	80	\$202,000	62	\$151,938
	FWS	333	818,482	154	432,369	195	\$591,971	201	\$659,934	210	\$684,224
	FSEOG	1,991	734,973	1,706	987,152	1,974	\$737,857	1,484	\$1,043,000	1,267	\$910,211
	LEAP		-		-		-		-		-
	Pell	13,463	\$47,703,090	0	\$47,199,077	13,148	\$45,293,943	12,865	\$44,193,986	13,688	\$54,194,810
	TOTAL		\$49,584,177		\$49,065,979		\$46,962,031		\$46,098,920		\$55,941,183
SLCC	Perkins Loan	394	\$694,097	306	\$697,540	157	\$353,182	124	\$245,010	28	\$59,430
	FWS	163	489,487	233	614,149	187	\$580,968	186	\$528,809	126	\$373,976
	FSEOG	725	630,583	856	731,871	749	\$662,618	721	\$653,806	925	\$702,350
	LEAP		-		-		-		-		-
	Pell	13,518	\$39,344,122	12,019	\$34,523,919	9,668	\$28,851,255	9,172	\$26,976,543	9,306	\$29,531,098
	TOTAL		\$41,158,289		\$36,567,479		\$30,448,022		\$28,404,168		\$30,666,854
TOTAL	Perkins Loan	3,956	\$9,100,651	3,336	\$8,305,870	4,017	\$9,113,203	2,623	\$6,128,248	1,392	\$3,178,194
USHE	FWS	2,132	\$5,901,740	1,997	\$5,640,698	1,979	\$5,101,064	1,903	\$5,221,624	1,817	\$4,887,242
	FSEOG	8,031	\$4,633,294	7,447	\$4,943,801	7,584	\$4,586,981	7,006	\$5,078,697	7,636	\$5,285,005
	LEAP	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0
	Pell	63,133	\$219,978,296	47,413	\$212,591,087	56,365	\$199,492,841	54,597	\$192,094,851	57,594	\$223,390,405
	TOTAL		\$239,613,981		\$231,481,456		\$218,294,089		\$208,523,420		\$236,740,846

Notes:

(1) Perkins Loan, PELL, FWS, FSEOG expenditures compiled from Institutional FISAPs for AY 17-18.

(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 Terrel H. Bell Teaching Incentive Loan (TIL) Program, and (3) 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.

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**

		2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Veterinary Medicine	# of Awards	29	28	25	22	17	11	5	0	0	0
	\$ Amount	\$652,800	\$660,350	\$654,750	\$575,050	\$435,000	\$321,300	\$156,500	\$0	\$0	\$0
Optometry	# of Awards	8	7	7	9	12	15	20	25	26	29
	\$ Amount	\$116,800	\$105,700	\$109,200	\$142,200	\$193,200	\$246,000	\$336,000	\$427,500	\$460,850	\$513,713
Podiatry	# of Awards	4	2	4	3	7	10	16	18	13	15
	\$ Amount	\$50,800	\$26,200	\$54,000	\$41,100	\$97,300	\$142,000	\$232,000	\$251,090	\$198,575	\$233,250
Administrative Fee	# of Awards	120,000	124,800	125,000	125,000	131,000	131,000	\$137,000	\$141,000	\$149,000	\$153,000
TOTAL	# of Awards	41	37	36	34	36	36	41	43	39	44
	\$ Amount	\$940,400	\$917,050	\$942,950	\$883,350	\$856,500	\$840,300	\$861,500	\$819,590	\$808,425	\$899,963

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

		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	50	50	50
	\$ Amount	\$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)⁽¹⁾

2012-13 through 2017-18

WAIVERS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
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
2017-18	104	\$273,124	168	\$451,963	196	\$572,449	157	\$484,255	625	370	\$1,781,791
STIPENDS	JULY - SEPTEMBER		OCTOBER - DECEMBER		JANUARY - MARCH		APRIL - JUNE		TOTAL		
	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	\$ Expended	Disbursements	Awardees	\$ Expended
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
2017-18	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
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
2017-18	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
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
2017-18	104	\$273,124	168	\$451,963	196	\$572,449	157	\$484,255	625	370	\$1,781,791
OTHER										Administrative Support Costs	Total Expenditures
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
2017-18										\$106,035	\$1,887,826

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 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 2017-18
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--2016						
Institution	Associate	Bachelor	Master	Doctoral	Formula	Percent
University of Utah	0	617	396	88	3700	39.09%
Utah State University	5	410	156	31	2117	22.37%
Weber State University	168	270	0	0	1416	14.96%
Southern Utah University	6	61	0	0	256	2.70%
Snow College	53	0	0	0	106	1.12%
Dixie State University	1	39	0	0	158	1.67%
Utah Valley University	151	221	0	0	1186	12.53%
Salt Lake Community College	263	0	0	0	526	5.56%
Total	647	1,618	552	119	9465	100%

Scholarship Funds Available for FY 2017-18:	\$38,400
Carry-Over from Previous Years:	\$0
Total Available for Allocation:	\$38,400

Institution	Scholarship Share	Amount Disbursed	Students Awarded
University of Utah	\$ 15,011	\$ 15,500	10
Utah State University	\$ 8,589	\$ 8,338	10
Weber State University	\$ 5,745	\$ 12,404	10
Southern Utah University	\$ 1,039	\$ -	0
Snow College	\$ 430	\$ 430	1
Dixie State University	\$ 641	\$ 641	1
Utah Valley University	\$ 4,812	\$ 4,812	6
Salt Lake Community College	\$ 2,134	\$ 9,409	5
Total	\$ 38,400	\$ 51,534	43

Table 8

USHE Educationally Disadvantaged Programs

<i>Utilization of Funds for Eligible Purposes</i>				<i>Scholarship Measures</i>			
Expenditure Category	2016-17	2017-18	Budget 2018-19	Measure	2016-17	2017-18	Budget 2018-19
University of Utah				University of Utah			
Scholarships - General	\$187,251	\$181,119	\$177,736	Students receiving general scholarships	223	237	226
Scholarships - Minority Students	82,207	79,515	78,030	Average per student	\$782	\$764	\$786
Tutoring	83,345	80,616	79,110	Minority students receiving scholarships	98	102	101
Counseling	437,559	423,230	415,325	Average per minority student	\$781	\$780	\$773
Total Expenditures	\$790,362	\$764,480	\$750,200				
Utah State University				Utah State University			
Scholarships - General	\$8,389	\$6,745	\$6,000	Students receiving general scholarships	0	1	1
Scholarships - Minority Students	83,222	86,792	84,000	Average per student	\$0	\$6,745	\$6,000
Tutoring	8,389	6,463	10,000	Minority students receiving scholarships	20	13	14
Counseling	0	0	0	Average per minority student	\$4,400	\$6,676	\$6,000
Total Expenditures	\$100,000	\$100,000	\$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	6,338	75,344	15,088	Minority students receiving scholarships	n/a	n/a	n/a
Counseling/Other scholarship	341,281	284,445	372,912	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$347,620	\$359,789	\$388,000				
Southern Utah University				Southern Utah University			
Scholarships - General	\$31,758	\$40,861	\$26,406	Students receiving general scholarships	30	56	34
Scholarships - Minority Students	9,900	20,862	20,000	Average per student	\$808	\$730	\$777
Tutoring	0	0	0	Minority students receiving scholarships	24	28	26
Counseling	51,674	24,133	49,494	Average per minority student	\$917	\$745	\$769
Total Expenditures	\$93,332	\$85,856	\$95,900				
Snow College				Snow College			
Scholarships - General	\$32,000	\$32,000	\$32,000	Students receiving general scholarships	80	30	30
Scholarships - Minority Students	0	0	0	Average per student	\$400	\$1,067	\$1,067
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	\$0	\$0	\$0	Students receiving general scholarships	0	0	0
Scholarships - Minority Students	25,500	25,500	25,500	Average per student	\$0	\$0	\$0
Tutoring	0	0	0	Minority students receiving scholarships	20	18	20
Counseling	0	0	0	Average per minority student	\$1,275	\$1,109	\$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	30,725	22,313	17,386	Minority students receiving scholarships	n/a	n/a	n/a
Counseling	148,073	142,728	161,914	Average per minority student	n/a	n/a	n/a
Total Expenditures	\$178,798	\$165,041	\$179,300				
Salt Lake Community College				Salt Lake Community College			
Scholarships - General	\$141,229	\$172,519	\$178,400	Students receiving general scholarships	200	236	0
Scholarships - Minority Students	0	0	0	Average per student	\$892	\$731	\$0
Tutoring	0	0	0	Minority students receiving scholarships	0	0	0
Counseling	0	0	0	Average per minority student	\$0	\$0	\$0
Total Expenditures	\$141,229	\$172,519	\$178,400				
Utah System of Higher Education				Utah System of Higher Education			
Scholarships - General	\$400,627	\$433,244	\$420,542	Students receiving general scholarships	533	560	291
Scholarships - Minority Students	\$200,829	\$212,669	\$207,530	Average per student	\$751.65	\$773.65	\$1,445.16
Tutoring	\$128,797	\$184,736	\$121,584	Minority students receiving scholarships	162	161	161
Counseling/Other scholarship	\$978,587	\$874,536	\$999,645	Average per minority student	\$1,240	1321	1289
Total Expenditures	\$1,708,841	\$1,705,185	\$1,749,300				

VI. STATUTORY

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2014-15	2015-16	2016-17	2017-18
Resident Tuition Waivers				
Resident 10% Meritorious				
UU	\$9,794,787	\$9,322,153	\$10,107,338	\$12,386,498
USU	7,094,309	7,532,780	8,360,875	9,198,403
WSU	6,165,318	6,665,314	6,842,146	6,110,774
SUU	2,887,638	3,158,621	3,285,109	3,186,005
Snow	989,632	1,137,933	1,044,012	520,413
DSU	2,086,909	2,121,025	2,249,875	2,440,554
UVU	6,681,297	7,740,608	9,091,084	9,305,275
SLCC	2,007,960	2,427,318	2,326,410	1,903,806
Subtotal	\$37,707,850	\$40,105,752	\$43,306,849	\$45,051,728
Resident 10% Impecunious				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	817,057
SUU	0	0	0	355,080
Snow	0	0	0	487,181
DSU	0	0	0	20,025
UVU	0	0	0	0
SLCC	0	0	0	176,845
Subtotal	\$0	\$0	\$0	\$1,856,188
Resident National Guard Waivers Set-aside				
UU	\$163,079	\$175,717	\$194,276	\$272,228
USU	166,843	245,255	250,065	250,324
WSU	126,241	138,078	141,597	142,919
SUU	70,116	73,303	73,699	94,688
Snow	2,998	10,808	12,784	14,762
DSU	29,388	37,126	53,346	54,681
UVU	143,769	139,800	213,520	239,320
SLCC	21,286	37,030	24,289	34,850
Subtotal	\$723,720	\$857,117	\$963,576	\$1,103,772
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	\$1,425,886	\$1,775,364	\$1,926,148	\$2,317,565
USU	10,874	3,461	12,320	57,380
WSU	0	143,625	154,229	182,645
SUU	0	0	0	0
Snow	0	0	0	0
DSU	64,196	81,992	85,317	72,381
UVU	111,888	125,304	118,558	130,508
SLCC	177,620	59,193	226,995	72,160
Subtotal	\$1,790,464	\$2,188,939	\$2,523,567	\$2,832,639

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2014-15	2015-16	2016-17	2017-18
Police or Firefighter Survivor				
UU	\$0	\$0	\$0	\$7,787
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	0
Snow	0	0	2,314	1,638
DSU	5,688	1,954	0	0
UVU	0	0	0	8,624
SLCC	0	0	0	0
Subtotal	\$5,688	\$1,954	\$2,314	\$18,049
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	\$52,252	\$23,640	\$45,920	\$28,870
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	\$52,252	\$23,640	\$45,920	\$28,870
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⁾

	2014-15	2015-16	2016-17	2017-18
Purple Heart Waiver				
UU	\$59,086	\$24,802	\$36,138	\$44,693
USU	51,278	20,755	32,393	28,139
WSU	19,552	26,293	26,303	13,829
SUU	13,032	7,381	17,322	27,832
Snow	0	0	3,196	4,914
DSU	14,062	9,933	7,181	11,488
UVU	33,599	27,004	14,027	33,612
SLCC	14,196	9,126	8,887	1,459
Subtotal	\$204,805	\$125,294	\$145,447	\$165,966
Scott B. Lundell-Fallen Soldiers' Dependants Waiver				
UU	\$0	\$0	\$22,641	\$11,039
USU	4,639	0	25,988	20,803
WSU	0	11,217	0	0
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	7,562	7,736	0	4,024
SLCC	4,559	779	2,967	3,041
Subtotal	\$16,760	\$19,732	\$51,596	\$38,907
Athletic Waivers- Residents				
UU	\$717,766	\$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	649,277	0	0	0
SLCC	140,820	0	0	0
Subtotal	\$1,507,863	\$0	\$0	\$0
Total Resident Waivers				
UU	12,212,856	11,321,676	12,332,461	15,068,680
USU	7,327,943	7,802,251	8,681,641	9,555,049
WSU	6,311,111	6,984,527	7,164,275	7,267,224
SUU	2,970,786	3,239,305	3,376,130	3,663,605
Snow	992,630	1,148,741	1,062,306	1,028,908
DSU	2,200,243	2,252,030	2,395,719	2,599,129
UVU	7,627,392	8,040,452	9,437,189	9,721,363
SLCC	2,366,441	2,533,446	2,589,548	2,192,161
Total Resident	\$42,009,402	\$43,322,428	\$47,039,269	\$51,096,119

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2014-15	2015-16	2016-17	2017-18
Nonresident Tuition Waivers				
Meritorious Nonresident Undergraduate				
UU	\$2,800,294	\$6,454,437	\$7,359,426	\$11,074,618
USU	7,593,534	9,248,083	8,327,507	6,753,592
WSU	2,272,869	2,561,714	2,720,926	2,921,951
SUU	1,955,717	5,014,564	6,642,732	7,492,813
Snow	645,498	671,652	537,060	645,213
DSU	336,862	270,695	298,745	3,570,372
UVU	4,082,754	5,621,363	5,271,360	5,501,477
SLCC	22,489	30,701	16,075	273,303
Subtotal	\$19,710,017	\$29,873,209	\$31,173,831	\$38,233,339
Meritorious Nonresident Graduate Waivers				
UU	\$0	\$0	\$0	\$0
USU	3,691,291	3,898,004	3,778,644	4,298,096
WSU	524,251	594,213	493,348	498,376
SUU	0	75,486	73,290	126,054
Snow	0	0	0	0
DSU	0	0	0	0
UVU	0	0	350,880	330,304
SLCC	0	0	0	0
Subtotal	\$4,215,542	\$4,567,703	\$4,696,162	\$5,252,830
WICHE / WUE				
UU	\$2,989,399	\$2,267,986	\$3,726,441	\$0
USU	1,155,815	1,339,460	1,437,531	0
WSU	631,299	663,562	629,980	0
SUU	2,378,679	2,747,631	3,720,811	0
Snow	145,260	134,290	181,778	0
DSU	704,304	977,275	1,823,886	0
UVU	2,293,875	3,611,254	4,074,018	0
SLCC	181,138	178,598	248,777	0
Subtotal	\$10,479,769	\$11,920,056	\$15,843,222	\$0
Reciprocal Agreements				
UU	\$0	\$0	\$0	\$0
USU	0	0	0	0
WSU	0	0	0	0
SUU	0	0	0	4,296,601
Snow	0	0	0	0
DSU	272,956	210,357	151,383	84,029
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$272,956	\$210,357	\$151,383	\$4,380,630
Border Waivers				
UU	\$53,824	\$0	\$57,377	\$90,591
USU	23,178	6,858	0	0
WSU	8,654	6,320	0	0
SUU	8,247	2,789	2,500	0
Snow	0	0	0	0
DSU	142,728	77,491	75,216	35,505
UVU	0	9,816	0	0
SLCC	0	0	0	2,060
Subtotal	\$236,631	\$103,274	\$135,093	\$128,156

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2014-15	2015-16	2016-17	2017-18
Certain Utah High School Graduates- Undocumented				
UU	\$907,728	\$1,055,793	\$1,048,290	\$1,084,250
USU	242,078	278,426	268,093	338,582
WSU	468,399	525,223	632,445	644,743
SUU	93,435	126,505	209,684	207,781
Snow	0	0	0	0
DSU	0	0	0	0
UVU	1,406,934	1,488,840	1,714,680	1,843,129
SLCC	1,750,716	2,068,144	1,648,561	2,486,393
Subtotal	\$4,869,290	\$5,542,931	\$5,521,753	\$6,604,878
Certain Utah High School Graduates-Foreign Nationals				
UU	\$487,766	\$570,878	\$680,598	\$723,403
USU	84,367	100,055	142,140	196,200
WSU	21,881	118,503	82,419	52,514
SUU	0	0	0	0
Snow	0	0	0	0
DSU	0	0	0	0
UVU	156,907	183,748	243,278	277,048
SLCC	61,902	72,172	79,708	96,461
Subtotal	\$812,823	\$1,045,356	\$1,228,143	\$1,345,626
Nonresident Transition Waivers				
UU	\$205,016	\$196,219	\$390,401	\$60,437
USU	20,514	0	0	0
WSU	0	0	0	0
SUU	293,798	944,981	542,083	351,470
Snow	0	0	0	0
DSU	2,570,621	3,078,379	3,671,131	730,086
UVU	0	0	0	0
SLCC	0	0	0	0
Subtotal	\$3,089,949	\$4,219,579	\$4,603,615	\$1,141,993
Athletic Waivers- Non-Residents				
UU	\$0	\$665,019	\$674,520	\$716,154
USU	1,713,091	1,753,427	1,743,488	1,921,337
WSU	1,283,475	1,323,522	1,369,839	1,400,751
SUU	819,025	844,000	845,406	2,181,928
Snow	353,105	323,973	347,070	442,263
DSU	205,030	243,842	239,749	1,031,942
UVU	641,309	1,482,284	887,539	1,025,211
SLCC	240,560	161,250	242,940	277,677
Subtotal	\$5,255,595	\$6,797,317	\$6,350,550	\$8,997,263

Table 9

USHE Statutory Tuition Waivers ⁽¹⁾

	2014-15	2015-16	2016-17	2017-18
Alumni Legacy Scholarship				
UU	\$135,000	\$178,500	\$226,500	\$241,500
USU	12,892,845	17,148,770	19,756,313	19,262,076
WSU	333,171	386,634	525,304	683,982
SUU	259,739	279,150	373,032	605,236
Snow	0	0	199,233	217,250
DSU	240,936	232,158	256,939	258,642
UVU	0	0	20,320	26,035
SLCC	0	0	0	0
Subtotal	\$13,861,691	\$18,225,212	\$21,357,640	\$21,294,721
Total Non-Resident Waivers				
UU	\$7,579,027	\$11,388,832	\$14,163,553	\$13,990,953
USU	27,416,713	33,773,083	35,453,716	32,769,883
WSU	5,543,999	6,179,691	6,454,261	6,202,317
SUU	5,808,640	10,035,106	12,409,537	15,261,883
Snow	1,143,863	1,129,915	1,265,141	1,304,726
DSU	4,473,437	5,090,197	6,517,048	5,710,574
UVU	8,581,779	12,397,305	12,562,075	9,003,204
SLCC	2,256,805	2,510,865	2,236,060	3,135,894
Total Non-Resident	\$62,804,263	\$82,504,994	\$91,061,391	\$87,379,434
Total Waivers (Resident and Nonresident)				
UU	\$19,791,883	\$22,710,508	\$26,496,014	\$29,059,633
USU	\$34,744,656	\$41,575,334	\$44,135,357	\$42,324,932
WSU	\$11,855,110	\$13,164,218	\$13,618,536	\$13,469,541
SUU	\$8,779,426	\$13,274,411	\$15,785,667	\$18,925,488
Snow	\$2,136,493	\$2,278,656	\$2,327,447	\$2,333,634
DSU	\$6,673,680	\$7,342,227	\$8,912,767	\$8,309,703
UVU	\$16,209,170	\$20,437,757	\$21,999,264	\$18,724,567
SLCC	\$4,623,246	\$5,044,311	\$4,825,608	\$5,328,055
Total Waivers	\$104,813,664	\$125,827,422	\$138,100,660	\$138,475,553

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	2017-18	Budget 2018-19	Measure	2017-18		Budget 2018-19	
				Number	Average Amount	Number	Average Amount
University of Utah			University of Utah				
Need-based Grants	\$2,425,900	\$2,449,700	Students Receiving Need-based Grants	3,737	\$649	2,450	\$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: Other*	60	\$2,264	63	\$3,175
Other housing stipends	135,848	200,000	Total Receiving Need-based Aid	3,760	\$681	2,513	\$1,054
Total Expenditures	\$2,561,748	\$2,649,700					
Utah State University			Utah State University				
Need-based Grants	\$579,225	\$1,700,000	Students Receiving Need-based Grants	388	\$1,493	60	\$2,833
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*	0	\$0	0	\$0
Other- Undergrad. Teaching Fellows	0	0	Total Receiving Need-based Aid	388	\$1,493	60	\$28,333
Total Expenditures	\$579,225	\$1,700,000					
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*	395	\$1,192	400	\$1,178
Need Based Other	471,000	471,299	Total Receiving Need-based Aid	395	\$1,192	400	\$1,178
Total Expenditures	\$471,000	\$471,299					
Southern Utah University			Southern Utah University				
Need-based Grants	\$355,080	\$334,755	Students Receiving Need-based Grants	60	\$5,918	57	\$5,873
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	60	\$5,918	57	\$5,873
Total Expenditures	\$355,080	\$334,755					
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*	0	\$0	0	\$0
Need Based Other	450,000	0	Total Receiving Need-based Aid	0	\$0	0	\$0
Total Expenditures	\$450,000	\$0					
Dixie State University			Dixie State University				
Need-based Grants	\$20,025	\$20,025	Students Receiving Need-based Grants	9	\$2,225	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	9	\$2,225	10	\$2,003
Total Expenditures	\$20,025	\$20,025					
Utah Valley University			Utah Valley University				
Need-based Grants	\$517,174	\$500,000	Students Receiving Need-based Grants	481	\$1,075	500	\$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	481	\$1,075	500	\$1,000
Total Expenditures	\$517,174	\$500,000					
Salt Lake Community College			Salt Lake Community College				
Need-based Grants	\$213,700	\$213,700	Students Receiving Need-based Grants	259	\$825	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 Work Study Awards	0	\$0	0	\$0
2nd-Tier Tuition Based Scholarships	0	0	Total Receiving Need-based Aid	259	\$825	0	\$534,250
Total Expenditures	\$213,700	\$213,700					
Utah System of Higher Education			Utah System of Higher Education				
Need-based Grants	\$4,111,104	\$5,218,180	Students Receiving Need-based Grants	4,934	\$650.08	3,077	\$1,695.65
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	455	\$3,080	463	\$1,450
2nd-Tier Tuition Based Scholarships	1,056,848	671,299	Total Receiving Need-based Aid	5,352	\$861.15	3,540	\$1,663.51
Total Expenditures	\$5,167,952	\$5,889,479					

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