



GEAR UP Virginia Scholarship

# Scholarship Policy Manual

2006-2012 Cohort

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## GEAR UP Program Overview

GEAR UP, an acronym for Gaining Early Awareness and Readiness for Undergraduate Programs, is a federal grant program funded by the U.S. Department of Education. The program is designed to work with an entire cohort of students beginning no later than seventh grade to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. In 2006, the State Council of Higher Education for Virginia (SCHEV) was awarded its second six-year matching grant to serve over 4,000 students in 25 school divisions across Virginia. Virginia's GEAR UP program provides several services, including tutoring, mentoring, career awareness, and college-readiness counseling. A portion of this federal grant is also designated to award scholarships to eligible students.

## GEAR UP Virginia Scholarship

The GEAR UP Virginia Scholarship is a financial aid program available to selected students from the 2006-2012 GEAR UP program cohort. In order to be considered for a scholarship, students must apply and meet several requirements, including Pell grant eligibility. Priority is given to students who demonstrate the greatest financial need. Scholarships are contingent upon funding and are not guaranteed. The scholarship is administered by SCHEV.

### Scholarship Contact

Administrator: Tierney McAuley  
Mailing Address: State Council of Higher Education for Virginia  
101 North 14<sup>th</sup> Street  
James Monroe Building, 10<sup>th</sup> floor  
Richmond, Virginia 23219  
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Email Address: TierneyMcAuley@schev.edu or GEARUPscholarship@schev.edu  
SCHEV Website: [www.schev.edu](http://www.schev.edu)  
GEAR UP Website: [www.gearupva.com](http://www.gearupva.com)

**Disclaimer:** As the primary administrator of the GEAR UP Virginia Scholarship, the State Council of Higher Education for Virginia reserves the right at its discretion and at any time to make changes to this scholarship policy during the awarding period. SCHEV will resolve any issues not specifically addressed in this document or in the federal regulations on a case by case basis with appropriate guidance from the U.S. Department of Education.

## Initial Eligibility Requirements

To be eligible for consideration for a GEAR UP Virginia Scholarship, a student must have:

- Been a member of the original 7<sup>th</sup> grade GEAR UP class in 2006-07.
- A signed student information release form on file with SCHEV.
- Been an active participant in GEAR UP-endorsed program activities.
- Graduated with a high school diploma from a participating GEAR UP high school by August 31, 2012.
- Had a cumulative grade point average (GPA) of 2.0 or above by the end of the first semester of their senior year. Must have maintained a 2.0 or above through graduation.
- Submitted a complete GEAR UP award application and all required documents to SCHEV by March 31, 2012.
- Been accepted and enrolled at least half-time in an undergraduate degree, diploma, or certification program at an eligible institution no later than the second fall semester following high school graduation. *See “Eligible Institutions” section below.*
- Successfully completed a Free Application for Federal Student Aid (FAFSA).
- Been eligible for and awarded the federal Pell grant.

*Please note that graduation and application deadlines differ for early GEAR UP graduates.*

## Renewal Requirements

To maintain eligibility for a GEAR UP Virginia Scholarship, students must meet the following requirements:

- Submit a complete renewal application packet by the determined deadline each year.
- Be enrolled at least half-time each term (not including summer) in an undergraduate degree, diploma, or certificate program at an eligible institution.
- Be in good standing with the institution and maintain Satisfactory Academic Progress (SAP).
- Have a minimum cumulative GPA of 2.0 at the end of each academic year.
- Successfully complete a FAFSA each year.
- Be eligible for and awarded the federal Pell grant.
- Have not exceeded the maximum length of eligibility.

## Eligible Institutions

An eligible institution is one that:

- Is physically located in the state of Virginia. *See exceptions below.*
- Participates in federal Title IV student aid programs, including the Pell grant.
- Agrees to participate in the GEAR UP Virginia Scholarship program.

Two Exceptions:

1. Students may be eligible to receive a scholarship at an institution located in a state that borders Virginia: Kentucky, Maryland, North Carolina, Tennessee, Washington, DC, or West Virginia. These institutions must otherwise meet the requirements listed above.
2. Students interested in a program not offered at a Virginia institution may be eligible to receive a scholarship at an institution that is not located in Virginia if the school participates in the Academic Common Market (ACM) program and otherwise meets the requirements listed above. Students must apply and be approved to participate in the ACM program in order to be considered for a scholarship.

## **Awarding Period**

Scholarship funding for the 2006-12 program cohort expires at the end of August 2018.

## **Award Year**

The scholarship award year begins each fall term. Summer is treated as a trailer term and is not included in the regular academic year or used to determine continuous enrollment.

## **Award Amount**

The maximum award amount is determined by SCHEV each year and must at least be equal to the maximum Pell grant award for the corresponding award year. Students' awards will be determined by their enrollment level and cost of attendance budget, which will be verified by their institution.

The following factors may affect the scholarship award amount:

- Availability of funds for 2006-12 cohort.
- Changes in federal or state regulations.
- Number of eligible applicants.
- The minimum amount of the scholarship is 75 percent of the average cost of attendance as determined by the institution or the maximum federal Pell grant award for the award year, whichever is less.
- The student is enrolled less than full-time, but at least half-time. In such cases, the award amount is prorated based on the percentage reduction in tuition and fee charges.
- The award in combination with other grants and scholarships exceeds the student's cost of attendance as determined by the institution. Institutions must reduce the GEAR UP Scholarship to prevent over awards.
- The student withdraws from courses requiring a recalculation of their financial aid awards. Institutions will adjust the scholarship in accordance with Return of Title IV regulations.

## **Maximum Length of Eligibility**

Eligible students may receive a scholarship for four years (i.e. eight semesters or 12 quarters, not including summer) with a possible fifth year of eligibility. Renewal scholarships are contingent upon funding and are not guaranteed. Scholarship eligibility expires once a recipient reaches the maximum number of years for eligibility or is granted their first bachelor's degree, whichever comes first.

## **Renewal Process**

Renewal applications for the subsequent academic year will be available to students in late spring. Students will be reminded of the renewal process and deadline periodically via email and mail until the determined deadline. Tentative award letters will be mailed during the summer before the fall term begins. Students will receive a tentative award letter if they submit all renewal application materials by the deadline, have at least a 2.0 cumulative GPS, and are in good standing with the institution. All other eligibility requirements will be verified by the institution. See *"Renewal Requirements"* on page 3 and *"Student Verification"* section on page 5.

## **Summer Awards**

If a student does not use their full scholarship during the regular academic year because they enrolled less than full-time (must be at least half-time) or did not have room in their cost of attendance, they may be eligible to receive their unused scholarship funds during the summer term. Students must maintain scholarship eligibility (enrollment, academic, and financial aid) and complete any summer financial aid forms required by their institution to receive their award. Eligible students will be notified by SCHEV in early spring. Summer awards are contingent upon funding and are not guaranteed.

## **Student Verification and Payment Process**

Before payments can be processed, students' enrollment and financial aid information must be verified in the GEAR UP database by the participating institution each term after the registration add/drop period. Students must pass verification each term to receive for their scholarship payment. Payment requests will be submitted to the Virginia College Savings Plan (VCSP) agency shortly after verification is completed by the institution and reviewed by SCHEV. It takes approximately two to three weeks to process and send payments. Institutional GEAR UP contacts will receive payment notifications from SCHEV once payments are sent.

## **Distribution of Funds**

Scholarship payments are distributed by term – from a Virginia Education Savings Trust (VEST) account administered by VCSP – as a single payment for all eligible students enrolled at the institution. Scholarships are divided into two (fall and spring) or three (fall, winter, and spring) installments, depending on whether the institution operates on a semester or quarter system. Payments are made directly to the institution, on the student's behalf, via direct deposit or check.

## **Use of Funds**

The GEAR UP Virginia Scholarship is intended to apply first to any charges posted on the student's account at the institution. Remaining amounts not exceeding the student's total cost of attendance may be refunded to the student. Any funds not refunded to the student must be promptly returned to SCHEV. Scholarship payments should only be used for current tuition and fees, not past due charges.

## **Loss of Eligibility**

The following will result in the cancellation of a student's GEAR UP VA Scholarship eligibility:

- Not enrolling at an eligible institution by the second fall term following high school graduation.
- Not submitting a complete GEAR UP renewal packet by the established deadline each academic year.
- Failure to maintain at least half-time enrollment each term in an undergraduate degree, diploma, or certification program at an eligible institution. *See "Leave of Absence" section on page 6.*
- Failure to maintain financial aid and academic eligibility – Satisfactory Academic Progress and/or cumulative grade point average. *See "Institution Financial Aid SAP Appeals" section on page 6.*
- Academic suspension from an institution. Eligibility will not be reinstated, even if the student transfers to a different institution.
- Loss of federal Pell grant eligibility due to increased Expected Family Contribution (EFC). Eligibility may be reinstated if the student's financial situation changes allowing them to regain eligibility for the Pell grant. Reinstatement depends on the availability of funds.
- Withdrawals from all courses and/or the institution. Eligibility may be reinstated for future terms through a successful appeal to SCHEV. *See "Eligibility Appeals" section on page 6.*

*Circumstances not covered above will be handled by SCHEV on a case by case basis.*

## **Eligibility Appeals** (Only for initial scholarship recipients)

Students may submit an appeal for reconsideration of their GEAR UP VA Scholarship eligibility for reasons **except** the following:

- Attending an institution that does not meet eligibility requirements.
- Not enrolling by the second fall term following high school graduation.
- Cumulative grade point average below 2.0 at the end of academic year.
- Academic suspension from an institution.
- Scholarship eligibility expiring due to reaching maximum length of eligibility.

## **Appeals Process**

Students should only submit an appeal if they have failed to comply with scholarship requirements due to circumstances beyond their control (i.e. medical, family, or financial hardships). Students interested in submitting an appeal should contact SCHEV to request an appeal form. Students will be required to submit supporting documentation with their appeal form to verify their circumstances. Detailed instructions are provided on the form.

All appeals regarding the loss of GEAR UP VA Scholarship eligibility will be handled by SCHEV. SCHEV will address issues on a case by case basis. Submitting an appeal does not guarantee approval. Students will receive notification of the decision by mail. Appeals submitted three months after the affected term will not be accepted.

## **Institution Financial Aid SAP Appeals**

If a student is denied financial aid for Satisfactory Academic Progress reasons, they will no longer be eligible to participate in the GEAR UP Scholarship program unless they receive an approved SAP appeal from their institution. Students should contact their institution's financial aid office for information regarding SAP requirements and appeals.

## **Leave of Absence**

Students must maintain continuous enrollment each term during the time they are receiving the scholarship; however, if needed, they may request a planned leave of absence for medical, family, or financial hardships. Such requests must be submitted in writing to SCHEV prior to the term in which the leave is needed. Students may be required to provide supporting documentation with their request. Leave of absence requests will be decided on a case by case basis. Please be aware that submitting a request does not guarantee approval.

## **Transfer Students**

Students are responsible for notifying SCHEV if they plan to transfer to another institution by submitting a copy of their acceptance letter from their new institution. Transferring without notice could affect the student's scholarship eligibility and/or payment processing time. Students who have been placed on academic suspension will permanently lose scholarship eligibility, even if they transfer to a different institution. SCHEV may contact institutions to verify academic standing.

## **Student Responsibilities**

SCHEV expects GEAR UP students to:

- Keep all contact information current
- Frequently check for GEAR UP emails
- Respond promptly to all requests from SCHEV.
- Notify SCHEV of changes in enrollment.
- Be familiar and comply with all scholarship requirements.
- Regularly communicate with their institution's financial aid office.

## **Administrative Responsibilities**

The State Council of Higher Education for Virginia (SCHEV) is the chief administrator of the GEAR UP Virginia Scholarship. SCHEV will rely on participating institutions to assist in verifying and monitoring student eligibility. The designated primary contact is usually a representative from the institution's financial aid office.

### **Institution Participation Agreement**

Due to the unique nature of this scholarship program, all institutions at which the scholarship will be distributed must complete a participation agreement. Participating institutions must abide by all federal and state program requirements. *Students are not eligible to receive an award if their institution chooses not to participate in this program.*

#### *Family Educational Rights and Privacy Act (FERPA)*

In accordance with the FERPA, all Virginia GEAR UP scholarship recipients have a FERPA form on file with SCHEV permitting the sharing of student-specific information between SCHEV, VCSP, and the attending institution. Such information includes, but is not limited to: names, addresses, student identification numbers, social security numbers, birth dates, college acceptance, enrollment, academic standing, program completion, and any financial information necessary to effectively administer the scholarship program.

### **Institutional GEAR UP Administrators/Contacts**

The primary GEAR UP contact is usually a member of the institution's financial aid office. Secondary contacts can be other employees of the financial aid office and/or student accounting/bursar's office.

### **Scholarship Database**

Participating institutions will have access to the web-based GEAR UP Virginia Scholarship database, which includes a step-by-step database user guide. Institutions will mainly use this database to verify student eligibility, update contact information, and view scholarship reports.

### **Verification Requirements**

Before payments can be processed, institutions must successfully complete and submit verification forms through the online database. Verification forms are available the day after the institution's registration add/drop period ends each term. Students who meet all requirements will be included on each verification form. Students must pass verification each term to receive their scholarship payment.

**Institutions are required to report information to verify student eligibility including the following:**

- Enrollment
- Academic standing
- Pell grant eligibility
- Degree
- Tuition and fee charges
- Cost of attendance
- Gift aid

### **Payments to Institutions**

*See "Distribution of Funds" and "Use of Funds" sections on page 5.*

## **Cost of Attendance/Scholarship Packaging**

According to federal GEAR UP regulations, the GEAR UP Scholarship may exceed a student's financial need; however, the scholarship, in combination with other grants and scholarships, must not exceed their total cost of attendance. Therefore, the institution may allow the scholarship to replace a portion of a student's Expected Family Contribution (EFC). Virginia institutions should refer to VSFAP regulations (8 VAC 40-130) when awarding the scholarship. Institutions should follow their policies when clearing cost of attendance over awards. Institutions should reduce loans and work-study first to clear any over awards created by the awarding of the GEAR UP VA Scholarship.

### *Suggested Awarding Order*

1. Federal Pell Grant
2. Other gift aid and tuition and fee waivers
3. **GEAR UP Virginia Scholarship\***
4. Loans and work-study awards

\* After verification is completed, institutions are encouraged to post GEAR UP scholarships to students' financial aid accounts in a pending status until funds are received.

## **Changes in Enrollment**

Institutions are encouraged to closely monitor enrollment for all GEAR UP scholarship recipients. SCHEV should be made aware of any changes in student enrollment that occur during the academic year.

## **Withdrawals**

If a student withdraws from courses, their award should be adjusted in accordance with federal Return of Title IV regulations. If adjustments are made, institutions must contact SCHEV to make arrangements to return remaining funds. Complete withdrawals from all courses will result in the cancellation of the student's eligibility for a scholarship for future terms, unless they receive an approved appeal from SCHEV.

## **Payment Reconciliation**

At the end of each academic year, participating institutions should verify that the payment information in their financial aid system matches the information in the GEAR UP VA Scholarship database. Any discrepancies must be reconciled with SCHEV.

## **Refunds to SCHEV**

Institutions may need to return scholarship funds to SCHEV for several reasons including:

- Changes in enrollment after add/drop period.
- Withdrawals from courses resulting in Return of Title IV adjustments.
- Changes in EFC making student ineligible for the Pell grant.
- Cost of attendance over award created by the awarding of additional financial aid.

Institutions must contact SCHEV before returning any funds to make sure a refund is necessary. If it is determined that the institution owes SCHEV a refund, the institution should *promptly* return funds using the instructions on page 9.

## Refund Instructions

1. All refunds should be returned via check only **made payable to the Virginia College Savings Plan.**
2. **Include references** to the GEAR UP Virginia Scholarship, the student's name, and term in which the refund is for.
3. **Mail refund checks to:** State Council of Higher Education for Virginia  
Attention: Tierney McAuley  
101 North 14<sup>th</sup> Street  
James Monroe Building, 10<sup>th</sup> floor  
Richmond, Virginia 23219  
**\* DO NOT mail checks directly to VCSP**

**Please note:** For circumstances not otherwise covered in this manual, federal Pell grant rules will be followed where applicable.



State Council of  
Higher Education for Virginia