

University of Colorado Monthly Compliance Meeting



Thursday, January 14, 2010

Today's Agenda

- ⦿ Jo's Announcements
- ⦿ Kris's Announcements
- ⦿ Financial Aid with Julie, Jo & Rob Drybread
- ⦿ Update from Housing with Ken Kucera
- ⦿ Compliance Quote

Jo's Announcements

- ⦿ National Letter of Intent – Signing period – Football, Soccer, Track/CC begins Wednesday February 3rd. Submit requests ASAP!
- ⦿ Change of Status- any aid reductions must be signed off by Mike Bohn- forward to him PRIOR to compliance.
- ⦿ Update your recruiting files – we will begin spot checks this semester with one of our law students.
- ⦿ Introduce Cameron Diehl, a 3rd year CU law student who will be an externship in our office this spring semester— you will see him at your practices from time to time.

Kris's Announcements

- Speaker –
 - Monday January 25
 - 7:00-8:00PM
 - Math 100
- Class Absence Letters
- Names of Potential Applicants
- Graduate Admissions
- Academic Luncheon
 - Tuesday April 27
 - 11:30AM-1:00PM

A Review of Financial Aid Legislation



Definitions

- Full Grant-In-Aid (FGIA).
 - Tuition and fees, room and board and required course-related books.

Bylaw 15.02.5

- Cost of Attendance (COA).
 - Includes total cost of:
 - Tuition and fees;
 - Room and board;
 - Books and supplies;
 - **Transportation**
 - **Insurance**
 - **Personal Expenses (entertainment, clothing, toiletries, etc.)**

As calculated by the financial aid office per federal guidelines.

Bylaw 15.02.2

Estimated FGIA Numbers (2009-10)

- ◎ Random Example of our SA-
 - 1st Year SA
 - Arts & Sciences –Open Option
 - Non-Resident
 - Living in the Dorms
 - Total FGIA=\$39,116.00
 - Tuition & Fees \$28,338
 - On-Campus \$10,378 (standard double room)
 - Books \$400 per year

Estimated Cost of Attendance (2009-10) for this same Student-Athlete

- Tuition & Fees \$28,338
- On-Campus Housing \$10,378 (standard double room)
- Books \$400 per year
- Transportation \$2168 (non-resident)
- Insurance \$2133
- Personal Expenses \$1269

- Total COA = \$44,686.00

Definitions

- ⦿ Individual Limit.

- Maximum amount of aid an individual may receive.

Bylaws 15.01.6 and 15.1

- ⦿ Counter.

- Student-athlete who must be counted against the sport team's scholarship limits.

Bylaw 15.02.3

Definitions

- Head-Count Sports:
 - Look at the number of **counters**, regardless of the amount of aid received.
 - Bylaws 15.5.2.1, 15.5.5.1 & 15.5.5.2
 - FB-85 (with 25 being initials)
 - WBB-15
 - MBB-13
 - Tennis-8
 - VB-12
- Equivalency sports:
 - One grant-in-aid can be **divided between multiple SAs.**
 - Each team has a maximum number of FGIAs that can be divided among team members.
 - M Golf-4.5
 - W Golf-6.0
 - Soccer-14
 - Skiing
 - Women-7
 - Men-6.3
 - Cross Country/Track & Field-
 - Women-18
 - Men-12.6

Eligibility for Institutional Athletics Aid

- Student-athlete must meet all guidelines.
 - Federal. (Pell grant = \$5350/yr)
 - State of Colorado.
 - NCAA.
 - Big 12 Conference.
 - University of Colorado.

Bylaw 15.01.5

Eligibility for Institutional Athletics Aid

Who can we put on scholarship?

- ⦿ Undergraduate SA with eligibility remaining under the five-year rule (Bylaw 14.2.1); or
- ⦿ Graduate SA with eligibility remaining under Bylaw 14.1.9; or

Bylaw 15.01.5 (a) and (b)

Eligibility for Institutional Athletics Aid

Who can we put on scholarship?

- ⦿ Within six years of initial full-time collegiate enrollment (provided no more than five years (10 semesters) of aid provided already during period); or
- ⦿ SA who is selected for an NCAA degree-completion award.

Bylaw 15.01.5 (c) and (d)

Eligibility for Institutional Athletics Aid Transfer Student-Athlete: From Four-Year Institution

- ⦿ During first academic year at certifying institution.
 - Remember, **MUST** have been academically eligible for competition had he/ she remained at the previous institution; or
 - Meet exception (non sponsored sport or nonparticipation).

Bylaws 14.5.5.4 and 14.5.5.4.1

Permissible Sources of Financial Aid

- Funds administered by CU (e.g., scholarships, grants, tuition waivers).

Bylaw 15.02.4.1

- Other permissible sources (e.g., parents, outside awards with athletics as major criterion and outside awards with athletics not a major criterion).

Bylaw 15.02.4.2

Maximum Financial Aid Limits: Individual Limit

Student-athlete's individual limit is their COA.

- Student-athletes may receive the following aid up to FGIA.
 - Athletically related institutional aid (scholarship).
 - Outside aid with athletics participation as a major criterion.
 - Educational expenses from an Olympic committee or a national governing body.

Maximum Financial Aid Limits: Individual Limit

- PLUS, a student-athlete may receive:
 - Other financial aid unrelated to athletics ability up to the COA;

Bylaw 15.1

OR

- For a SA who receives a Pell Grant, the greater of the value of a FGIA plus the Pell Grant or the value of a SA's COA.

Bylaw 15.1.1

How Does a Student-Athlete Become a Counter?

- The student-athlete:
 - Receives financial aid based on athletics ability.
 - Recruited and receives outside aid for which athletics participation is a major criterion.
 - Receives educational expenses from an Olympic committee or national governing body.
 - Receives institutional aid with no certification that the aid was not based on athletics ability.

Bylaws 15.5.1 and 15.5.1.1

Counter Notes

- ⦿ In some instances, SAs who receive institutional aid may not be counters.
 - SA aid specifically exempted by NCAA legislation.
 - Exhausted eligibility; or
 - Permanent Medical non-counters.
 - But remember, these folks still count in our EADA report (participation numbers).

How is an Equivalency Calculated?

- Calculate a fraction for all counters.
- **Numerator** includes all institutional aid for room, board, tuition and fees up to the value of a FGIA, except for legislated exceptions.
- **Denominator** is the value of a FGIA based on the actual costs or average costs of a FGIA for all students.
- The dollar amount used for books in both the numerator and the denominator is \$400.

Bylaw 15.5.3.2 and April 23, 2008 Official Interpretation

How is an Equivalency Calculated?

Exceptions.

- ◎ Academic Honor Awards.
 - Based on high school academic record.
 - Awarded independently of athletics interests.
 - Recipient must:
 - Be in the top 10% of graduating class; or
 - Achieve a cumulative GPA of at least 3.500; or
 - Achieve a minimum score of 1200 on the SAT or 105 on the ACT.

Bylaw 15.5.3.2.2.1.

How is an Equivalency Calculated?

Exceptions.

- Institutional Academic Scholarships.
 - Based on academic record at the institution.
 - Awarded independently of athletics interests.
 - Recipient must:
 - Complete one academic year at the certifying institution; and
 - Achieve a minimum cumulative GPA of 3.300.

Bylaw 15.5.3.2.2.2

CASE STUDIES: Juli, Brad and KJ

University of Colorado (estimate numbers only)

- FGIA, in state **\$15,000**
- COA, in state **\$20,000**

- FGIA, out of state **\$39,000**
- COA, out of state **\$45,000**

Juli - Facts:

- Recruited in-state soccer student-athlete.
- \$7,000 athletics scholarship.
- \$12,000 academic honor award.
 - Graduated high school with a cum GPA of 3.750;
 - Ranked 11th in her graduating class of 200
 - 1250 SAT and 106 ACT

Juli's financial aid worksheet

Athletics aid	\$ 7,000
Academic honor award	<u>\$12,000</u>
Total aid	\$19,000

Questions

Q1. Is Juli a counter?

Q2. May Juli receive all the aid described?

Q3. What is Juli's equivalency value?

Answers

- Is Juli a counter? **Yes, she is receiving athletics aid.**
- May Juli receive all the aid described? **Yes, the academic honor award is one of the permissible exceptions to the counter rule.**
- What is Juli's equivalency value?
 $\$7,000/15,000 = 47\%$

Brad – Facts:

- In-state golf student-athlete.
- Non recruited walk-on to the team.
- Part-time campus job.
- Tuition waiver (dad has been a faculty member for 10 years).
- Received local high school golf booster club award.

Brad's financial aid worksheet

Employment earnings	\$ 2,000
Tuition waiver	\$ 750
Golf booster club award	<u>\$ 500</u>
Total aid	\$ 3250

Questions

May Brad receive all the aid described?

What about Brad's equivalency?

If he did not accept the booster award?

If he DID accept the booster award?

Answers

Q1. May Brad receive all the aid described?

He may not receive the golf booster club award without it counting towards the team overall limits.

Q2. What would Brad's equivalency be if he did not accept the golf booster award? 0

Q3. What would Brad's equivalency be if he DID accept the golf booster award? 3%

Period of Institutional Financial Aid

- ⦿ During academic year, period of the award begins with the 1st day of class or practice, whichever is earlier.

Bylaw 15.02.7

- ⦿ “Period of award” for reduction/cancellation is from SA’s signing of award letter through period set forth in agreement.

Bylaw 15.3.4.3.2

Period of Institutional Financial Aid

- ⦿ One-Year Period.

- Aid **may not be** awarded in excess of one academic year or for a period of less than one academic year.

Bylaw 15.3.3.1

- **Aid shall be awarded in equal amounts for each term of the academic year.**

Bylaw 15.3.3.2

Period of Institutional Financial Aid

- ❑ Exceptions to one year period:
 - Midyear enrollment.
 - Final semester/quarter.
 - One-time exception-have not received before.
 - Eligibility exhausted/medical non-counter

Bylaw 15.3.3.1.1

Period of Institutional Financial Aid

❑ Additional Issues:

Financial aid authority precedent for renewals.

- PSA must be informed that the renewal will not be automatic.

Bylaw 15.3.3.1.2

Injury or illness policy.

- It is not permissible to assure the PSA that aid will automatically be renewed in case of an injury.

Bylaw 15.3.3.1.3

Period of Institutional Financial Aid

What about the summer term?

- Separate award.
- Awarded in proportion to aid during regular term.
 - For SAs attending only one term (100% Spring Only), they can still receive 100% in the summer b/c they were not enrolled in the fall. Does not apply to transfers.

Bylaw 15.2.8

When is Reduction or Cancellation Permitted During Period of Award?

- Ineligible.
- Fraud.
- Serious misconduct.
- Voluntary withdrawal. Bylaw 15.3.4.2
- Non adherence to non athletically related conditions included in financial aid agreement.

Bylaw 15.3.4.2.2

When is Reduction or Cancellation Not Permitted During Period of Award?

- Generally, not permitted for any reason not listed in Bylaw 15.3.4.2 or per Bylaw 15.3.4.2.2.
- Bylaw 15.3.4.3 specifically does not allow for reduction:
 - Based on the SA's athletics ability.
 - Because of an injury, illness or physical or mental medical condition.
 - For any other athletics reason.

Hearing Requirement

- ⦿ Prior to reduction or cancellation of institutional aid based in any degree on athletics ability, the SA must be provided with the following:
 - Written notice of the reduction or cancellation; &
 - Written notice of an opportunity for a hearing.
 - Written notice shall include a copy of CU's established policies and procedures for conducting the required hearing, including the deadline by which a SA must request such a hearing.

Bylaw 15.3.2.4

Hearing Requirement

- ⦿ Hearing must be prompt.
- ⦿ Hearing cannot be conducted by athletics department or faculty athletics committee.
 - Athletics department staff may be standing member of a committee that conducts hearings.

When is an Increase Permitted During Period of Award?

- Between the period when the SA signs the financial aid agreement and the beginning of the period of the award (i.e., first day of practice or class).
- During the period of the award, if the institution can demonstrate that the increase is unrelated to an athletics reason. (eg, financial hardship, gender equity, incoming PSA did not attend)

Bylaw 15.3.4.1

Renewals and Nonrenewals

- ⦿ Must be made in writing on or before July 1.
- ⦿ Notification must:
 - Be prompt and in writing.
 - Be sent to all SAs who received an award the previous academic year and has eligibility remaining.
 - Come from the Director of Financial; not from the athletics department.

Bylaw 15.3.5.1

- ⦿ Hearing required if not renewed or reduced.

Bylaw 15.3.2.4.

Questions?

Housing

WITH KEN KUCERA &
STAFF

Housing & Dining Services (HDS) Residence Halls
Application and Room Assignment Procedures and Timelines
First Year/Freshman and Continuing Student-Athletes
Fall 2010

- ◎ **Housing Application and Security Deposit**
 - First-year/freshman SAs are required to reside in the residence halls, unless approved through HDS petition process to reside at home.
 - New second-year SAs are not required to reside on-campus.
 - Continuing SAs may reapply for residence halls accommodations and select their own hall/room for fall 2010.

The First-Year/Freshman Process

- Confirmed through Admissions w/ enrollment deposit.
- HDS sends correspondence to SAs within 1 to 2 business days of Admissions confirmation, with instructions on how to apply for housing.
- Confirmed SAs can access the on-line housing application at **housing.colorado.edu**.
 - Need CU Login Name and Identikey Password to apply –provided to all new students during Admissions process.
 - Requires a \$300 housing security deposit via credit card.
 - Hardcopy housing applications available upon request.
 - Housing deposit deferral process available for documented financial need. (note: will be assessed to student's bill after enrollment)

Continuing Student-Athletes (Those currently residing in the halls.)

- On-line reapplication process will be January 25 – February 5, 2010.
- On-line reapplication is a self-assignment process.

Residence Hall Space Requests for First Year/Freshman Student-Athletes

- In late-January 2010, e-mails will be sent to individual sports/liaison to obtain space requests for fall; e.g., number of beds by gender, special needs, etc.
- Space is allocated “proportionally” on central campus, Kittredge, and Williams Village; residential academic programs (RAP) and Bear Creek not included.
- Spaces for assignment will be in standard double rooms w/ community baths.

Hall Space Assigned To Student-Athletes

- Applies only to first-year and new second-year SAs.
- In mid-February 2010, based on earlier e-mail requests for space, e-mails will be sent to individual sports/liaison noting the number, location, and gender of spaces or units available for fall assignments.

Assignment Process for Student-Athletes

- Based on e-mailed space lists provided to individual sports/liaison , coaches will indicate room assignment preferences for their SAs. These assignment preferences will be submitted to HDS Occupancy Management on an on-going basis during the spring 2010 semester.
- Space will be available for assignments until Monday, June 21, 2010. After this date, all space not assigned to an application on file with HDS Occupancy Management will be released for other use.
- After June 21, assignment requests may be submitted by coaches on a case-by-case basis for late applicants and/or folks with special needs. (Available space will be limited – late applicants may be assigned with non-student-athletes.)



Review of Some Important Timelines

- Submittal of housing applications for first-year or new second-year student-athletes is strongly recommended by mid-May, 2010.
- E-mails for hall space requests will be sent to individual sports/liaison in late-January.
- Continuing student-athletes may participate in the on-line reapplication self-assignment process starting in late-January.
- Spaces not assigned to first-year and new second-year student-athletes by Monday, June 21, 2010, will be released for other use.

Communication

- On-line application & assignments:
Candyce Gustafson, ph 303.735.5622
- Hardcopy apps and security deposit
deferral: Ava Goodheart, ph 303.735-
5616
- E-mail: Reservations@Colorado.edu;
Candyce.Gustafson@Colorado.edu
- Designate contacts for individual
sports/liaison.

Thank you for your attention today!!