



**40th Annual Survey
2008-09 Academic Year**

Survey Instrument

Part 1

Contact Information

Agency Name	<input type="text"/>
Primary Contact Name	<input type="text"/>
Primary Contact E-mail	<input type="text"/>
Secondary Contact Name	<input type="text"/>
Secondary Contact E-mail	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Agency Website Address	<input type="text"/>

General Questions

	Yes	No	N/A
Is your agency the designated SHEEO for the state?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it review or approve budgets of public institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is it involved in setting tuition in public institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it approve programs offered by public institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it approve programs offered by private institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency certify or license postsecondary institutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is it responsible for the administration of a college savings plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it administer a state prepaid tuition plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it administer a pre-college/early intervention outreach program?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency guarantee federal student loans?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency provide a secondary market for student loans?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Federal Programs

Which other federal programs does the agency administer? (Please check all that apply)

	If administered, how much federal money is awarded?
<input type="checkbox"/> LEAP/SLEAP	\$ <input type="text"/>
<input type="checkbox"/> GEAR UP	\$ <input type="text"/>
<input type="checkbox"/> Robert C. Byrd Scholarships	\$ <input type="text"/>
<input type="checkbox"/> Christa McAuliffe Scholarships	\$ <input type="text"/>
<input type="checkbox"/> Paul Douglas	\$ <input type="text"/>
<input type="checkbox"/> Other <input style="width: 150px;" type="text"/>	\$ <input type="text"/>
Total	\$ <input type="text"/>

Private Programs

Does the agency administer any privately funded programs?

Yes No

Please list them by type of program and amount awarded

	Program Name	Program Type	Amount awarded in 2008-2009
1.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
2.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
3.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
4.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
5.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
6.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
7.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
8.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
9.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
10.	<input type="text"/>	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text"/>	\$ <input type="text"/>
		Total	\$ <input type="text"/>

Boxes under Program Type allow choice of grant/scholarship, loan, or work-study.

Agency Leadership

Is the agency's executive director appointed by: (Check all that apply)

- The governor
- The legislature
- A board or commission
- Other:

Part 2 (Repeated for each program)

Program Name

	Yes	No	N/A
1. Is this program new this year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Did you report information for this program last year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is this program authorized, but not funded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has this program been discontinued? [?]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. What type of award is made through this program?

- Grant or Scholarship
- Loan
- Work-Study
- Tuition waiver (funded or unfunded) [?]
- Loan assumption or forgiveness [?]
- Conditional grant or loan [?]
- Other

6. Administering Agency for this program

- Reporting Agency
- Co-Administered
- Other Agency

If Co-administered or administered by another agency, please provide the name of the other agency

Contact Person

7. Who determines student eligibility requirements?

- State
- Campus
- Other

8. Who selects the recipients?

- State
- Campus
- Other

9. Are students excluded from eligibility for any of the following reasons?

(Please add in other other reasons for exclusion and check all that apply)

- No exclusions
- Age
- No high school diploma or its equivalent
- Non-residents
- Students in short vocational programs (non Title IV eligible)
- Incarcerated students
- Other

10. Which of the following students are eligible? (Check all that apply)

- Students who are state residents attending institutions in your state
- Students who are residents of other states, who attend in your state
- Students who are state residents attending an institution in another state
- Students enrolled exclusively in distance education classes provided by institutions in the state
- Students who are state residents enrolled exclusively in distance education classes provided by institutions outside the state

11. Are all eligible students funded?

12. Which of the following types of student may be eligible for an award under this program? (Check all that apply)

- Undergraduate, full-time
- Undergraduate, at least half-time
- Undergraduate, less than half-time
- Graduate, full-time
- Graduate, at least half-time
- Graduate, less than half-time

Standard for award (Check all that apply)

13. Need (indicate which choice provides the closest description of how need is defined for this program)

- Expected Family Contribution*
- Need (cost-EFC)*
- Maximum income/income based*
- N/A*

14. Merit (Check all that apply)

- Test score*
 - Performance* ?
 - Class Rank*
 - Grades*
- Minimum grade

15. Special purpose of award (A purpose other than general student assistance. Check all that apply)

- Tuition Equalization ?
- Workforce development ?
- Retraining ?
- Post-service ?
- Parent or spouse service ?
- Disability ?
- Send students to other states for specialized programs not available in state
- Other

Total Program Expenditures (Include S/LEAP and matching funds)

	2007-2008	2008-2009
16. Total \$ disbursed	Previous year data will be displayed here	<input type="text"/>
17. Unduplicated headcount of recipients		<input type="text"/>
18. Maximum award ?		<input type="text"/>
19. Minimum award ?		<input type="text"/>

20. Source of state program funds expended for the current year
(Include matching funds. Check all that apply)

<input type="checkbox"/> General fund	\$	<input type="text"/>
<input type="checkbox"/> Lottery	\$	<input type="text"/>
<input type="checkbox"/> Special tax	\$	<input type="text"/>
<input type="checkbox"/> Student fees/tuition	\$	<input type="text"/>
<input type="checkbox"/> S/LEAP	\$	<input type="text"/>
<input type="checkbox"/> Matching Funds	\$	<input type="text"/>
<input type="checkbox"/> Other <input type="text"/>	\$	<input type="text"/>
<input type="checkbox"/> Other <input type="text"/>	\$	<input type="text"/>
Total	\$	<input type="text"/>

21. Program expenditures and number of recipients by type of institution

<i>Institution Type</i>	<i>Dollars Awarded</i>	<i># of Recipients</i>
Public		
< 2 year in-state	<input type="text"/>	<input type="text"/>
2 year in-state	<input type="text"/>	<input type="text"/>
4 year in-state	<input type="text"/>	<input type="text"/>
Out-of-state	<input type="text"/>	<input type="text"/>
Private not-for-profit		
< 2 year in-state	<input type="text"/>	<input type="text"/>
2 year in-state	<input type="text"/>	<input type="text"/>
4 year in-state	<input type="text"/>	<input type="text"/>
Out-of-state	<input type="text"/>	<input type="text"/>
Proprietary		
< 2 year in-state	<input type="text"/>	<input type="text"/>
2 year in-state	<input type="text"/>	<input type="text"/>
4 year in-state	<input type="text"/>	<input type="text"/>
Out-of-state	<input type="text"/>	<input type="text"/>
Grand Total	<input type="text"/>	<input type="text"/>

22. Distribution of the number of recipients and dollars awarded by student enrollment

	Undergraduate		Graduate	
	Dollars Awarded	# of Recipients	Dollars Awarded	# of Recipients
Full-time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
At least half-time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Less than half-time	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Totals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full-time, Full year	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

23. Income distribution of recipients - Part 1

Income distribution should be based on adjusted gross income plus nontaxable income.

Dependent Recipients

	Dollars Awarded	Number of Recipients
\$0 - 19,999	\$ <input type="text"/>	<input type="text"/>
\$20,000 - 39,999	\$ <input type="text"/>	<input type="text"/>
\$40,000 - 49,999	\$ <input type="text"/>	<input type="text"/>
\$50,000 - 59,999	\$ <input type="text"/>	<input type="text"/>
\$60,000 - 79,999	\$ <input type="text"/>	<input type="text"/>
\$80,000 - 99,999	\$ <input type="text"/>	<input type="text"/>
Over \$100,000	\$ <input type="text"/>	<input type="text"/>
Totals	\$ <input type="text"/>	<input type="text"/>
Median Income of Dependent Recipients	\$ <input type="text"/>	

24. Income distribution of recipients - Part 2

Note: Income categories are not the same as for dependent recipients

Independent Recipients

	Dollars Awarded	Number of Recipients
\$0 - 2,999	\$ <input type="text"/>	<input type="text"/>
\$3,000 - 5,999	\$ <input type="text"/>	<input type="text"/>
\$6,000 - 9,999	\$ <input type="text"/>	<input type="text"/>
\$10,000 - 14,999	\$ <input type="text"/>	<input type="text"/>
\$15,000 - 19,999	\$ <input type="text"/>	<input type="text"/>
\$20,000 - 29,999	\$ <input type="text"/>	<input type="text"/>
\$30,000 - 39,999	\$ <input type="text"/>	<input type="text"/>
\$40,000 - 49,999	\$ <input type="text"/>	<input type="text"/>
Over \$50,000	\$ <input type="text"/>	<input type="text"/>
Totals	\$ <input type="text"/>	<input type="text"/>
Median Income of Independent Recipients	\$ <input type="text"/>	

25. Comments on the program

Part 3

26. Name of the primary state-funded, need-based program

If the program does not appear in this list you must add it in part 2 of the survey.

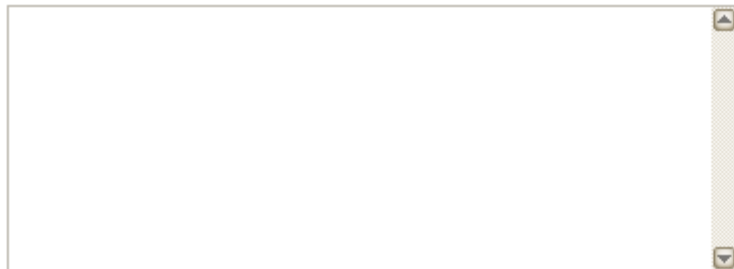


Programs will be shown in drop down box. Multiple programs may be selected by shift-clicking or control-clicking with the mouse.

27. Which need analysis system does your agency use to determine need in your primary need based program?

- Federal Methodology (FM)
- FM with some modifications *
- Special state system *
- Institutional option *
- Other *

* Please describe any special state method for determining need including data elements that may supplement those collected through the FAFSA



28. What resources are counted when determining expected family contribution?

- Family resources (parent and student contribution)
- Parent resources only
- Student resources only
- Other

29. In determining student eligibility do you provide any special treatment for state college savings or pre-paid tuition plans?

If yes, please describe

	As family contribution	As student contribution	Excluded	As an additional resource
State college savings plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State prepaid tuition plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. Do you provide any special treatment for federal tuition tax credits?

31. In your primary need based program, can aid be used to defray:

- Cost of attendance
- Only approved tuition and fees

32. In determining award for your primary need based program do you:

- Recognize the student's current cost of attendance?
- Impose limits on the amount of costs that are recognized by the program?

33. What do you use as the starting budget in your primary need based program?

Current year's actual cost of attendance

- using no budget caps
- with budget caps
- N/A

Previous year's actual cost of attendance

- using no budget caps
- with budget caps
- N/A

Current year's tuition and fees

- using no budget caps
- with budget caps
- N/A

Previous year's tuition and fees

- using no budget caps
- with budget caps
- N/A

Other

General Definition of Enrollment

34. How do you define full-time enrollment for undergraduates?

- 15 semester credit hours or its equivalent
- 12 semester credit hours or its equivalent
- Other

35. Do you have a different definition of full-time enrollment for graduate students?

If yes, what is the definition:

36. What were the considerations in setting the maximum award?

38. To help people understand how your primary program works, please provide a narrative description of how eligibility and awards were calculated and determined in your primary program for 2008-2009.

Examples:

"Maximum eligibility is calculated based on tuition and fees plus a student budget minus computer costs and 50 percent of Pell. Awards are limited to....etc."

"Students must receive an instate high school diploma, have an ACT score of 18, a GPA of 2.5 and enroll as a first-time freshman. Awards are for tuition and certain fees...etc."

39. Please provide a narrative overview of how higher education governance and financial aid provision is structured in your state and how your agency fits into this picture.

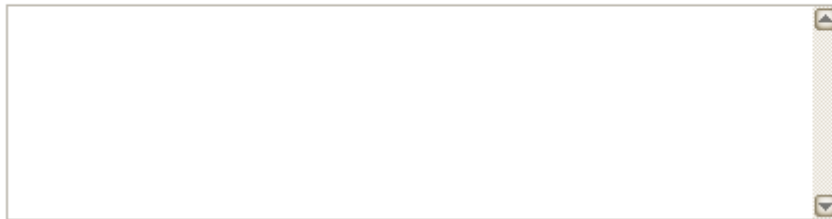
Examples:

"The Big State Education Agency reports to the Big State Board and centrally administers all state funded student financial aid...etc."

"Schools in Big State report to one of 4 boards. The Office of Student Financial Assistance sets tuition and enrollment targets ...etc."

A large, empty rectangular text input box with a thin border. On the right side, there is a vertical scrollbar with a small upward-pointing arrow at the top and a downward-pointing arrow at the bottom.

40. In addition to any comments you made in the individual programs, is there any information you would like to share that might be helpful in interpreting the data you have reported on this survey?

A large, empty rectangular text input box with a thin border. On the right side, there is a vertical scrollbar with a small upward-pointing arrow at the top and a downward-pointing arrow at the bottom.