

Developing Financial Aid Metrics

SHEEO Guided Pathways and Financial Aid Metrics in State Data Systems

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What Hawai'i is doing


- Financial Aid Data Available
<http://www.hawaii.edu/irao/>
- Students' Average Unmet Need
- Percent of Direct Costs Met by Grant Assistance
- WICHE/NCHEMS Affordability Analysis
- Cost of Attendance & Tuition Setting Discussions
- Hawai'i Promise Scholarship Program

Financial Aid Data for Campus Decision-Making

FINAID Reports



0. Student Financial Aid Awards: Undergraduate Students
1. Student Financial Aid Awards: Undergraduate Students
2. State & Institutional Grants & Scholarships: Undergraduate Students
3. Pell Recipients
4. Student Loan Indebtedness: Undergraduate Non-Transfer Students
5. Enrollment And Aid Distribution, By Aid Source, By Unit
6. Student Financial Aid Assistance - Unmet Need Report: Undergraduate Resident Students





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DATASET OPTIONS

Academic Year 2017-20 ▾

UH SYSTEM ▾

Awarded ▾

Resident & Non Resident ▾

All Ethnicities ▾

SUBMIT

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FINAID TABLE 0
HISTORICAL TABLE OF STUDENT FINANCIAL AID AWARD REPORT: UNDERGRADUATE STUDENTS
ACADEMIC YEAR 2017-2018
AWARDED
ALL ETHNICITIES

AWARD TYPE	ACADEMIC YEAR				
	2014	2015	2016	2017	2018
No. Of Recipients					
Pell Recipients x	18,517	17,913	16,465	14,992	14,531
Other Federal Grant Recipients x	1,553	1,456	1,452	1,510	1,558
State & Inst Grants/Scholarship Recipients x	15,616	15,398	15,516	15,434	15,799
External Scholarship Recipients x	737	642	697	799	781
Federal Work Study x	700	813	740	652	680
Total \$ Awarded					
Pell Recipients x	67,234,147	66,181,449	61,371,029	55,702,649	56,512,922
Other Federal Grant Recipients x	1,667,304	1,388,980	1,467,427	1,494,509	1,466,971
State & Inst. Grants/Scholarship Recipients x	47,672,333	49,507,318	53,075,770	55,442,504	58,383,253
External Scholarship Recipients x	2,569,765	2,145,252	2,838,956	4,033,195	4,193,806
Federal Work Study x	1,403,489	1,820,616	1,700,033	1,585,315	1,694,222
Average \$ Awarded					
Pell Recipients x	3,631	3,695	3,727	3,715	3,889
Other Federal Grant Recipients x	1,074	954	1,011	990	942
State & Inst Grants/Scholarship Recipients x	3,046	3,215	3,421	3,592	3,695
External Scholarship Recipients x	3,487	3,342	4,073	5,048	5,370
Federal Work Study x	2,005	2,239	2,297	2,431	2,492

Note that the sources for these reports are from financial aid (IRO_FA_AWARD_BY_PERSON and IRO_FA_STUDENT). The sources for the Board of Regents Financial Aid Report are from accounts receivable (MTT_ACCOUNT_DETAIL). Report differences are noted in this document: [FA-AR-ComparisonDocument.pdf](#)

Footnotes:

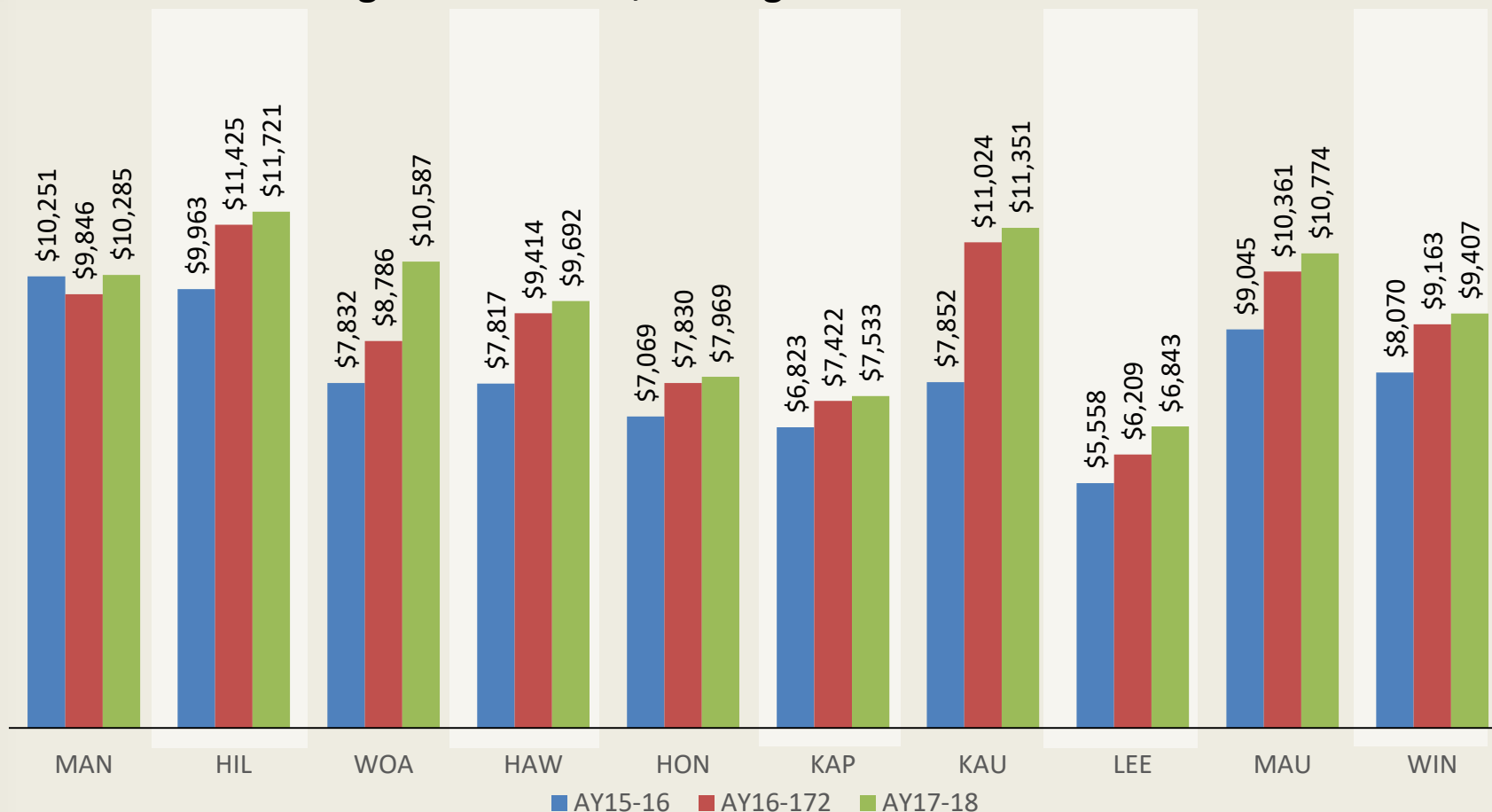
1. A recipient is a student that has been dispersed an award amount greater than 0. Student counts are unduplicated; therefore, UH System and UH Community Colleges totals will not equal to the sum of individual units. Total \$ Awarded amounts may not sum due to rounding.
2. Awarded includes all students who were awarded regardless of enrollment. Awarded & Enrolled includes students who were Awarded & Enrolled in Fall and/or Spring semesters.
3. Federal Pell Grant Program (Detail code %PEL).
4. Other Federal Grant Recipients. Includes Supplemental Educational Opportunity Grants (%SEO), Academic Competiveness Grants (%ACG, %AC2), National Science and Mathematics Access to Retain Talent (SMART) Grants (%MRT, %MR4), The Teacher Education Assistance for College and Higher Education (TEACH) Grants (BGTE, BGTG), Iraq and Afghanistan Service Grant (WIAS), TRIO Grants (%TRI, BSSG), and Windward STAAR Grants (WSTR).
5. State & Institutional Grants or Scholarship includes scholarships, grants, tuition waivers, and stipends.
6. External Scholarship Recipient awards are from other fund source types and student resources.
7. Federal Title IV Federal Workstudy is a federally funded program that assists colleges in creating campus-based employment.

Average Unmet Need (Total Cost) of Resident Undergraduate Students

1. **Average Unmet Need** is the average Total Cost of Education amount that is not covered by Scholarships or Grants.
2. **Based on students who are** Undergraduate, Residents, and have Total Need > 0 .
3. **Total Cost of Education** = tuition, fees, room & board (anywhere), books, supplies, computers, transportation, personal expenses, and other educational costs.
4. **Total Need** = Total Cost of Education – Expected Family Contribution (EFC) – Aid from Private Sources
5. **Unmet Need \$ Amount** = Total Need – Scholarships or Grant Aid Provided

Average Unmet Need (Total Cost) of Resident Students

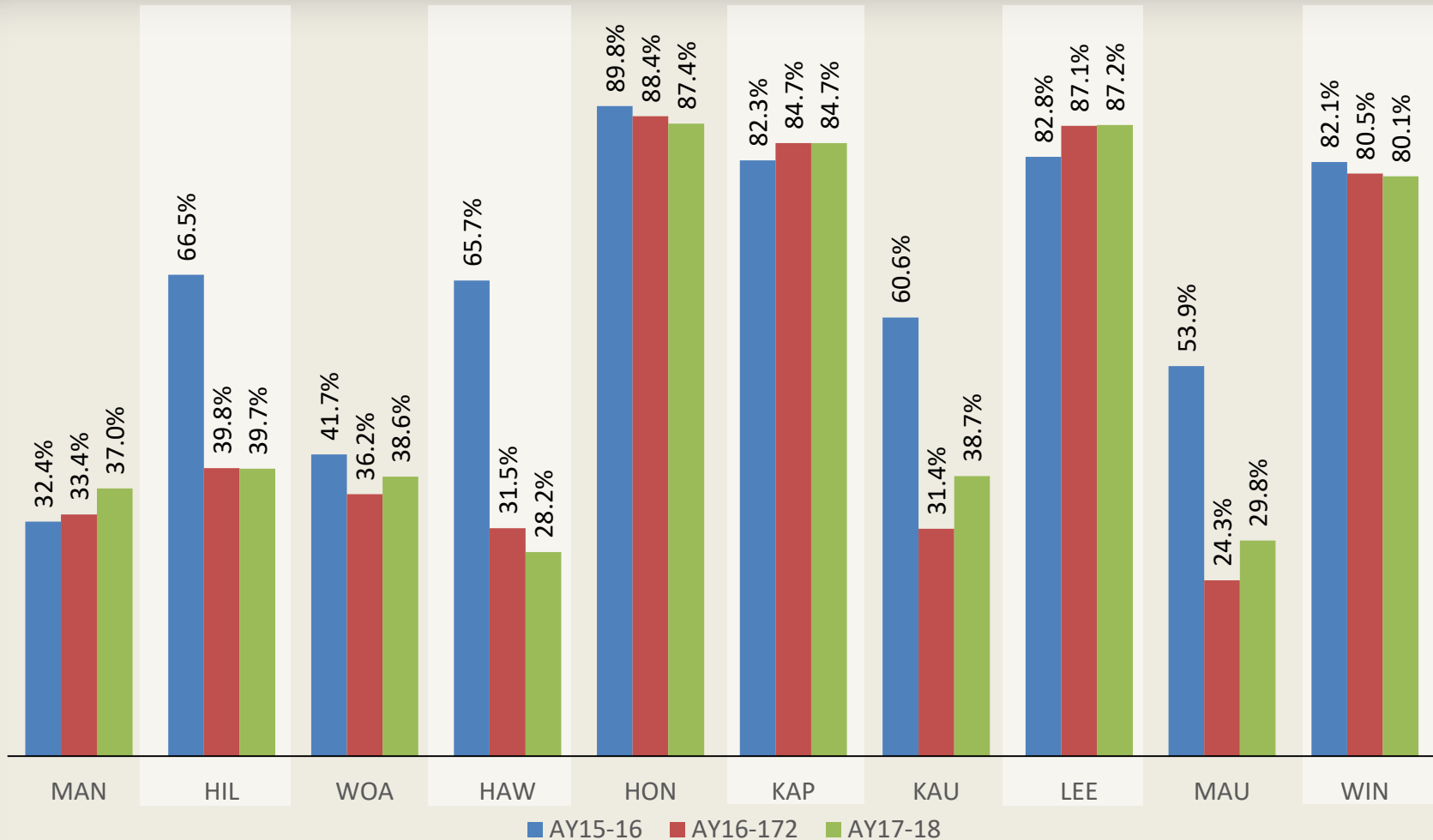
Average Unmet Need, Undergraduate Resident Students



Percent of Direct Cost Met of Undergraduate Resident Students

1. **Direct Cost** = tuition, fees, books, supplies, and transportation costs.
2. **Percent of Direct Cost met** is the proportion of students whose Direct Cost of Education amount has been covered by Scholarships or Grants.
3. **Based on students who are** Undergraduate, Residents, and have Total Need > 0 .
4. **Direct Cost Need headcount** = (Direct Cost – Expected Family Contribution (EFC) – Aid from Private Sources) > 0
5. **Met Need headcount** = Direct Cost Need headcount – Unmet Need headcount

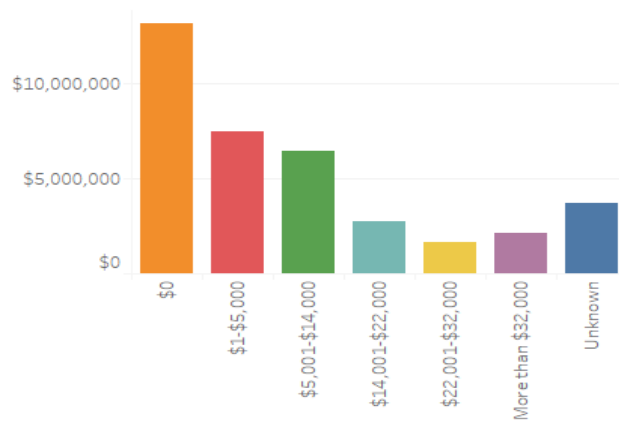
Percent of Direct Cost Met of Undergraduate Resident Students – Full Year students



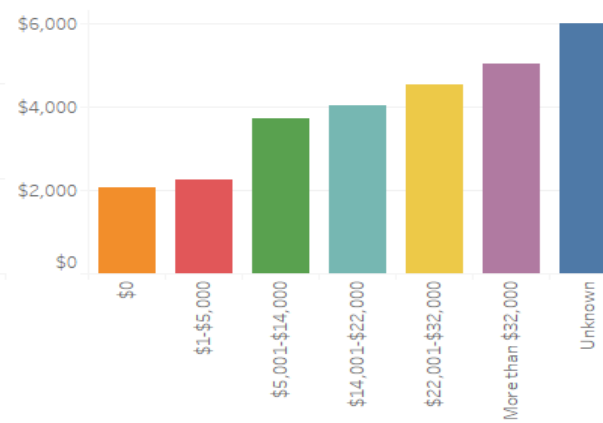
NCHEMS Data – Institutional Grants by EFC

Award Profile by EFC Band

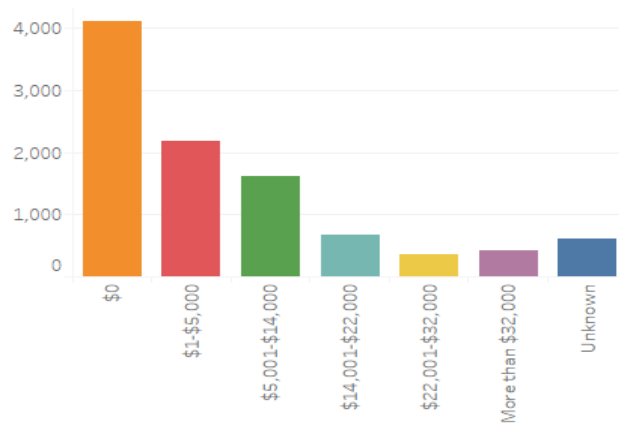
Total Dollars Awarded by EFC



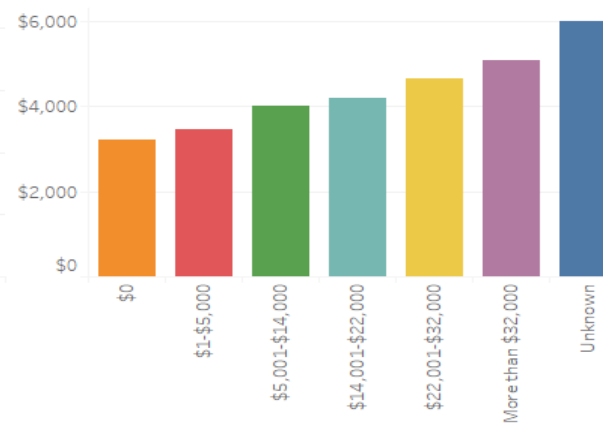
Average Award per Student



Recipients by EFC



Average Award per Recipient



Award
Institution Grants

Academic Year
2016-17

Institution
All

Attendance Status
All

Residency Status
Hawaii Resident

Age Groups
All

Enrollment Level
Undergraduate

First Time Freshman
All

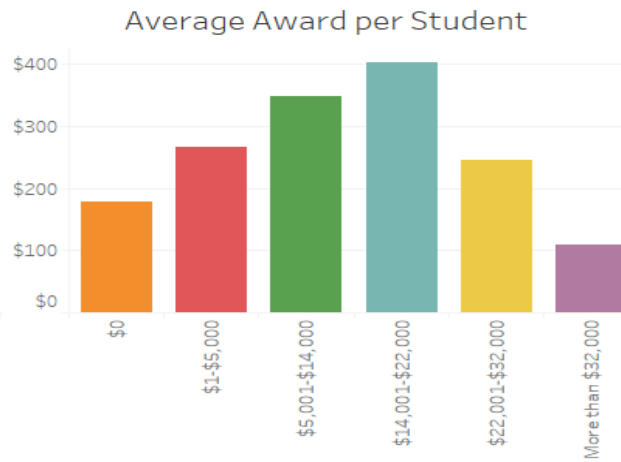
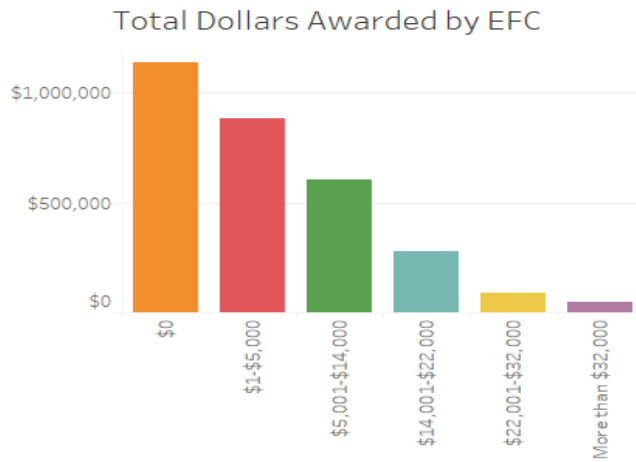
Dependency Status
All

Prior Credits Earned (group...
All

Department
All

NCHEMS Data – State Grants by EFC

Award Profile by EFC Band



Award State Grants

Academic Year 2016-17

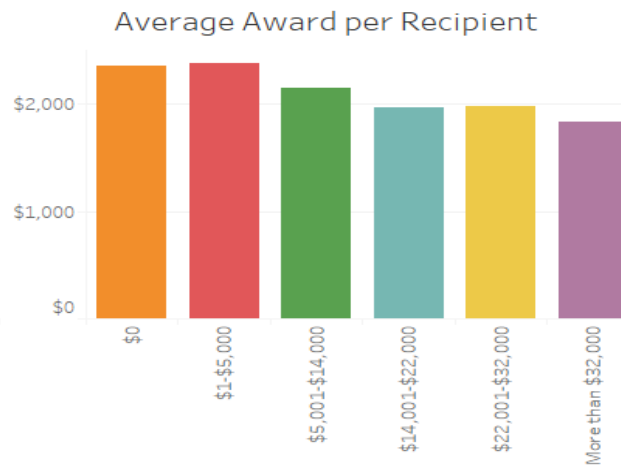
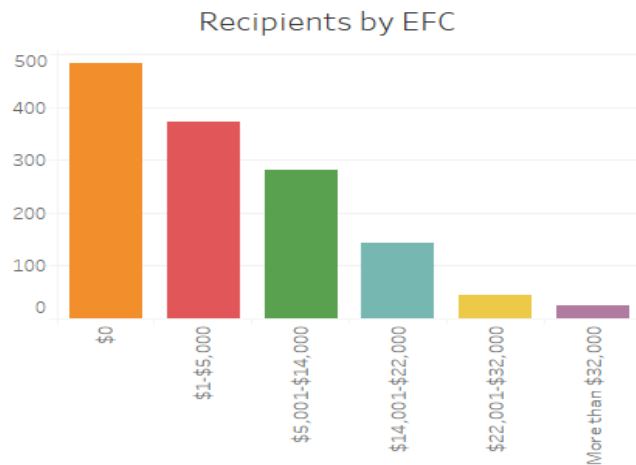
Institution All

Attendance Status All

Residency Status Hawaii Resident

Age Groups All

Enrollment Level Undergraduate



First Time Freshman All

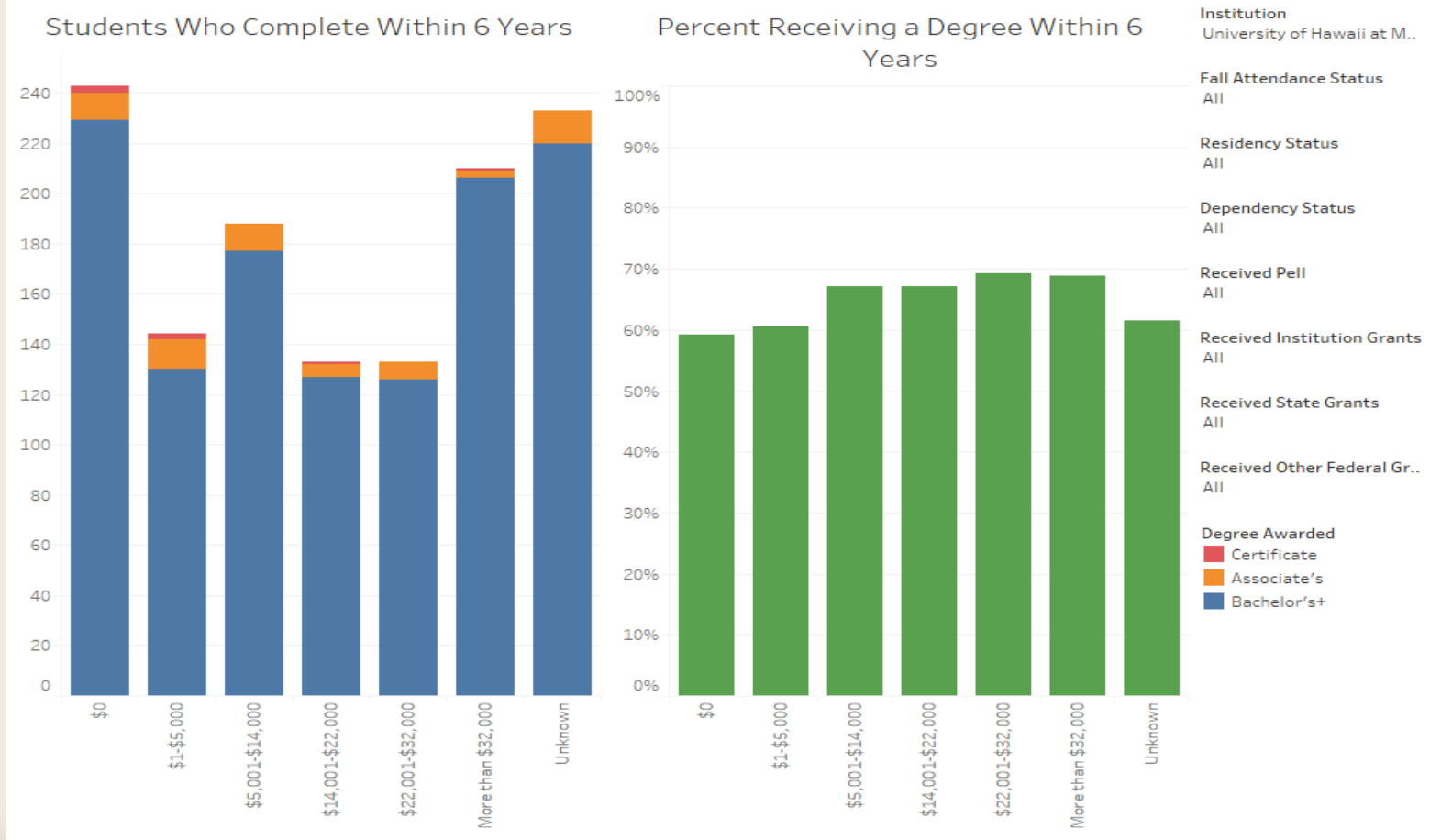
Dependency Status All

Prior Credits Earned (group) All

Department All

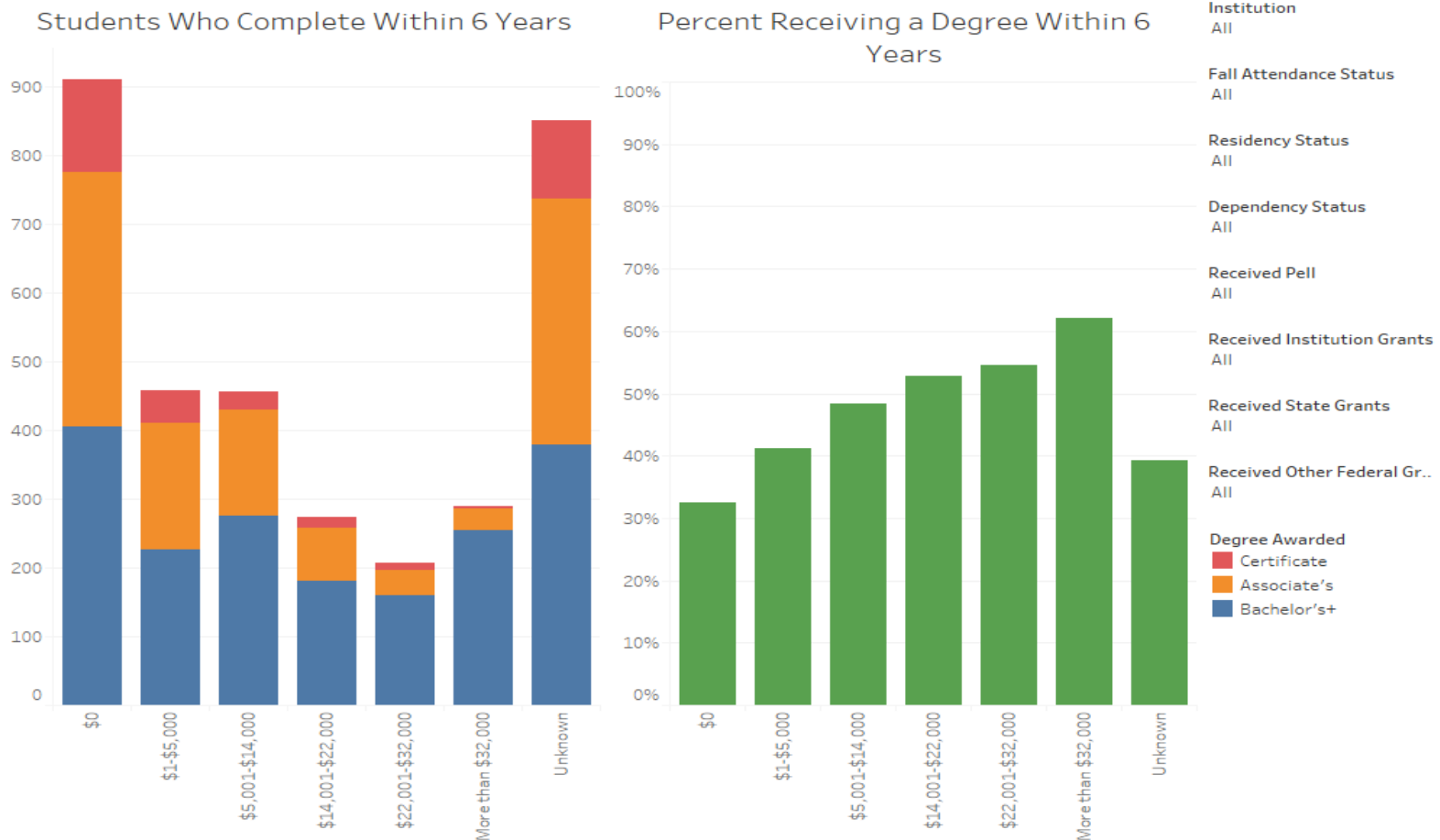
NCHEMS Data – Campus Specific Completions by FT FR by EFC

Completions of First Time Freshman by EFC Band



NCHEMS Data – Completions by FT FR by EFC

Completions of First Time Freshman by EFC Band



Factors Affecting Cost of Attendance

- Availability of financial aid data informs policy discussions on cost of attendance
- COA Regulations:
 - Reasonableness – “modest but adequate”
 - Standardization – representative sample or average
 - Resources – existing data, research, survey, or statistical analysis
- Accuracy – economic issue can become academic issue if COA is not accurate (too high or too low)

COA – A National Issue

- Some COA components are highly subjective
- Various institutions in same communities provide extremely different estimates for off-campus living
- Inaccurate COA budgets negate affordability messages and impact enrollment decisions
- Inflated cost of living can result in inefficient and inequitable allocation of financial aid and/or excess student loan borrowing
- Artificially low cost of living can result in student not being able to obtain necessary financial support to attend college
- This summer - using financial aid data to investigate alternative approaches to COA determination for 2020-21

Factors Affecting Future Tuition Schedules

- Availability of financial aid data informs policy discussions on tuition schedules
- Competitiveness Issues
 - Ensure that Graduate level tuition rates are comparable to competitors
 - Ensure the Non-resident tuition rates are competitive, especially for international students
- Financing and Cost Issues
 - Examine the relationship between tuition and facilities maintenance
 - Examine the relationship between tuition and new programs and services

Hawai'i Promise – Focused on Need

- Student must complete FAFSA
- Federal Government determines Expected Family Contribution (EFC)
- EFC applied 25% to direct costs; 75% to living expenses
- Student is awarded Pell, UH scholarships, and private scholarships to meet direct costs
- If there remain unmet direct costs, student is awarded Hawai'i Promise Scholarship to meet the unmet need.

Questions?

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