



Senate

General Assembly

File No. 176

January Session, 2023

Substitute Senate Bill No. 1043

Senate, March 22, 2023

The Committee on Higher Education and Employment Advancement reported through SEN. SLAP of the 5th Dist., Chairperson of the Committee on the part of the Senate, that the substitute bill ought to pass.

AN ACT CONCERNING THE ROBERTA B. WILLIS SCHOLARSHIP PROGRAM.

Be it enacted by the Senate and House of Representatives in General Assembly convened:

1 Section 1. Section 10a-173 of the general statutes is repealed and the
2 following is substituted in lieu thereof (*Effective July 1, 2023*):

3 (a) For the purposes of this section:

4 (1) ["Family"] (A) Prior to July 1, 2024, "family contribution" means the
5 expected family contribution for educational costs as computed from
6 [the] a student's Free Application for Federal Student Aid; and

7 (B) On and after July 1, 2024, "family contribution" means the amount
8 in excess of a student's financial need as determined by the student aid
9 index;

10 (2) "Full-time or part-time undergraduate student" means a student
11 who is enrolled at an institution of higher education in a course of study

12 leading to such student's first associate or bachelor's degree and who is
13 carrying, for a full-time student, twelve or more semester credit hours,
14 or, for a part-time student, between six and eleven semester credit hours
15 at such institution of higher education;

16 (3) "Independent institution of higher education" means a nonprofit
17 institution established in this state (A) that has degree-granting
18 authority in this state; (B) that has its main campus located in this state;
19 (C) that is not included in the Connecticut system of public higher
20 education; and (D) whose primary function is not the preparation of
21 students for religious vocation;

22 (4) "Public institution of higher education" means the constituent
23 units of the state system of higher education identified in subdivisions
24 (1) and (2) of section 10a-1;

25 (5) "Eligible educational costs" means the tuition and required fees for
26 an individual student that are published by each institution of higher
27 education participating in the grant program established under this
28 section, plus a fixed amount for required books and educational
29 supplies as determined by the Office of Higher Education; and

30 (6) "Student aid index" means the financial aid index as computed
31 from a student's Free Application for Federal Student Aid.

32 (b) The state, acting through the Office of Higher Education, shall
33 establish the Governor's Scholarship program to annually make need-
34 based financial aid available for eligible educational costs for
35 Connecticut residents enrolled at Connecticut's public and independent
36 institutions of higher education as full-time or part-time undergraduate
37 students beginning with new or transfer students in the fiscal year
38 ending June 30, 2014. On and after July 1, 2016, said program shall be
39 known as the "Roberta B. Willis Scholarship program". Any award made
40 to a student in the fiscal year ending June 30, 2013, under the capitol
41 scholarship grant program, established under section 10a-169 of the
42 general statutes, revision of 1958, revised to January 1, 2013, the
43 Connecticut aid to public college students grant program, established

44 under section 10a-164a of the general statutes, revision of 1958, revised
45 to January 1, 2013, Connecticut aid to Charter Oak, established under
46 subsection (c) of section 10a-164a of the general statutes, revision of
47 1958, revised to January 1, 2013, or the Connecticut independent college
48 student grant program, established under section 10a-36 of the general
49 statutes, revision of 1958, revised to January 1, 2013, shall be offered
50 under the Roberta B. Willis Scholarship program and be renewable for
51 the life of the original award, provided such student meets and
52 continues to meet the need and academic standards established for
53 purposes of the program under which such student received the original
54 award.

55 (c) Within available appropriations, the Roberta B. Willis Scholarship
56 program shall include a need and merit-based grant, a need-based grant
57 and a Charter Oak grant. The need and merit-based grant shall be
58 funded at not less than twenty per cent but not more than thirty per cent
59 of available appropriations. The need-based grant shall be funded at up
60 to eighty per cent of available appropriations. The Charter Oak grant
61 shall be not less than one hundred thousand dollars of available
62 appropriations. There shall be an administrative allowance based on
63 one-quarter of one per cent of the available appropriations, but (1) for
64 the fiscal year ending June 30, 2022, not less than three hundred fifty
65 thousand dollars, and (2) for the fiscal year ending June 30, 2023, and
66 each fiscal year thereafter, not less than one hundred thousand dollars.
67 In addition to the amount of the annual appropriation allocated to the
68 regional community-technical colleges under subsection (e) of this
69 section, and to regional community-technical college students under
70 subsection (d) of this section, not less than two and one-half per cent of
71 the annual appropriation shall be allocated to the regional community-
72 technical colleges to be used for financial aid purposes.

73 (d) The Roberta B. Willis Scholarship need and merit-based grant
74 shall be available to any Connecticut resident who is a full-time or part-
75 time undergraduate student at any public or independent institution of
76 higher education. The Office of Higher Education shall determine
77 eligibility by financial need based on family contribution and eligibility

78 by merit based on either previous high school academic achievement or
79 performance on standardized academic aptitude tests. The Office of
80 Higher Education shall make awards according to a sliding scale,
81 annually determined by said office, up to a maximum family
82 contribution and based on available appropriations and eligible
83 students. The Roberta B. Willis Scholarship need and merit-based grant
84 shall be awarded in a higher amount than the need-based grant
85 awarded pursuant to subsection (e) of this section. Recipients of the
86 need and merit-based grant shall not be eligible to receive an additional
87 need-based award. The order of institutions of higher education
88 provided by a student on the student's Free Application for Federal
89 Student Aid shall not affect the student's eligibility for an award under
90 this subsection. The accepting institution of higher education shall
91 disburse sums awarded under the need and merit-based grant for
92 payment of the student's eligible educational costs.

93 (e) The Roberta B. Willis Scholarship need-based grant shall be
94 available to any Connecticut resident who is a full-time or part-time
95 undergraduate student at any public or independent institution of
96 higher education. The amount of the annual appropriation to be
97 allocated to each institution of higher education shall be determined by
98 its actual full-time equivalent enrollment of undergraduate students
99 who are Connecticut residents with a family contribution during the fall
100 semester of the fiscal year two years prior to the grant year of an amount
101 not greater than two hundred per cent of, prior to July 1, 2024, the
102 maximum family contribution or, on and after July 1, 2024, the student
103 aid index eligible for a federal Pell grant award for the academic year
104 one year prior to the grant year. Not later than July first, annually, each
105 institution of higher education shall report such enrollment data to the
106 Office of Higher Education. Not later than October first, annually, the
107 Office of Higher Education shall (1) publish such enrollment data on its
108 Internet web site, and (2) notify each institution of higher education of
109 the proportion of the annual appropriation that such institution of
110 higher education will receive the following fiscal year and publish the
111 proportions for each institution of higher education on its Internet web
112 site. Participating institutions of higher education shall make awards

113 (A) to eligible full-time students in an amount up to four thousand five
114 hundred dollars, and (B) to eligible part-time students in an amount that
115 is prorated according to the number of credits each student will earn for
116 completing the course or courses in which such student is enrolled, such
117 that a student enrolled in a course or courses earning (i) at least nine but
118 less than twelve credits is eligible for up to seventy-five per cent of the
119 maximum award, and (ii) at least six but less than nine credits is eligible
120 for up to fifty per cent of the maximum award. Each participating
121 institution of higher education shall expend all of the moneys received
122 under the Roberta B. Willis Scholarship program as direct financial
123 assistance only for eligible educational costs.

124 (f) Participating institutions of higher education shall annually
125 provide the Office of Higher Education with data and reports on all
126 Connecticut students who applied for financial aid, including, but not
127 limited to, students receiving a Roberta B. Willis Scholarship grant, in a
128 form and at a time determined by said office. If an institution of higher
129 education fails to submit information to the Office of Higher Education
130 as directed, such institution shall be prohibited from participating in the
131 scholarship program in the fiscal year following the fiscal year in which
132 such institution failed to submit such information. Each participating
133 institution of higher education shall maintain, for a period of not less
134 than three years, records substantiating the reported number of
135 Connecticut students and documentation utilized by the institution of
136 higher education in determining eligibility of the student grant
137 recipients. Such records shall be subject to audit or review. Funds not
138 obligated by an institution of higher education shall be returned by May
139 first in the fiscal year the grant was made to the Office of Higher
140 Education for reallocation. Financial aid provided to Connecticut
141 residents under this program shall be designated as a grant from the
142 Roberta B. Willis Scholarship program.

143 (g) The Roberta B. Willis Scholarship Charter Oak grant shall be
144 available to any full-time or part-time undergraduate student enrolled
145 in Charter Oak State College. The Office of Higher Education shall
146 allocate any appropriation to Charter Oak State College to be used to

147 provide grants for eligible educational costs to residents of this state
148 who demonstrate substantial financial need and who are matriculated
149 in a degree program at Charter Oak State College. Individual awards
150 shall not exceed a student's calculated eligible educational costs.
151 Financial aid provided to Connecticut residents under this program
152 shall be designated as a grant from the Roberta B. Willis Scholarship
153 program.

154 (h) In administering the Roberta B. Willis Scholarship program, the
155 Office of Higher Education shall develop and utilize fiscal procedures
156 designed to ensure accountability of the public funds expended. Such
157 procedures shall include provisions for compliance reviews that shall be
158 conducted by the Office of Higher Education on any institution of
159 higher education that participates in the program. Commencing with
160 the fiscal year ending June 30, 2015, and biennially thereafter, each such
161 institution of higher education shall submit the results of an audit done
162 by an independent certified public accountant for each year of
163 participation in the program. Any institution of higher education
164 determined by the Office of Higher Education not to be in substantial
165 compliance with the provisions of the Roberta B. Willis Scholarship
166 program shall be ineligible to receive funds under the program for the
167 fiscal year following the fiscal year in which the institution of higher
168 education was determined not to be in substantial compliance. Funding
169 shall be restored when the Office of Higher Education determines that
170 the institution of higher education has returned to substantial
171 compliance.

172 (i) Not later than January 1, 2024, and annually thereafter, the Office
173 of Higher Education shall submit, in accordance with the provisions of
174 section 11-4a, to the joint standing committee of the General Assembly
175 having cognizance of matters relating to higher education, a report
176 concerning the Roberta B. Willis Scholarship program for the current
177 fiscal year, including, but not limited to, the (1) amount of the annual
178 appropriation allocated to each participating institution of higher
179 education pursuant to subsection (e) of this section and awarded to
180 students at each participating institution of higher education pursuant

181 to subsection (d) of this section, and (2) number of Connecticut residents
182 who were awarded grants.

This act shall take effect as follows and shall amend the following sections:		
Section 1	July 1, 2023	10a-173

Statement of Legislative Commissioners:

In Subsec. (a)(1)(A), "Prior to July 1, 2024," was added before "family contribution" for accuracy; in Subsec. (d), "and on and after July 1, 2024, based on student aid index" was removed from the second sentence for internal consistency; and in Subsec. (e), "prior to July 1, 2024," was added after "two hundred per cent of" in the second sentence for accuracy.

HED *Joint Favorable Subst. -LCO*

The following Fiscal Impact Statement and Bill Analysis are prepared for the benefit of the members of the General Assembly, solely for purposes of information, summarization and explanation and do not represent the intent of the General Assembly or either chamber thereof for any purpose. In general, fiscal impacts are based upon a variety of informational sources, including the analyst's professional knowledge. Whenever applicable, agency data is consulted as part of the analysis, however final products do not necessarily reflect an assessment from any specific department.

OFA Fiscal Note**State Impact:** None**Municipal Impact:** None**Explanation**

The bill, which requires the Office of Higher Education (OHE) to annually report various statistics of the Roberta B. Willis Scholarship program, is not anticipated to result in a fiscal impact as OHE has the staff and expertise necessary to do so. The bill also makes various conforming changes that do not have a fiscal impact.

The Out Years**State Impact:** None**Municipal Impact:** None

OLR Bill Analysis**sSB 1043*****AN ACT CONCERNING THE ROBERTA B. WILLIS SCHOLARSHIP PROGRAM.*****SUMMARY**

Beginning by January 1, 2024, this bill requires the Office of Higher Education to start annually reporting to the Higher Education and Employment Advancement Committee on the Roberta B. Willis Scholarship program for the current fiscal year, including at least the:

1. amount of the annual need-based grant and need-merit grant appropriation allocated to each participating higher education institution and awarded to students at each institution, respectively, and
2. number of students awarded grants.

By law, the Roberta B. Willis scholarship is the state's financial aid program for Connecticut residents who attend a public or independent higher education institution in the state. It consists of need-merit, need-based, and Charter Oak grants. Need-merit and need-based are both means-tested grants, although the need-merit also requires high academic achievement.

The bill also updates statutory language in the Roberta B. Willis Scholarship program to reflect changes in federal law, which is phasing out the "Expected Family Contribution" (EFC) and replacing it with the "Student Aid Index" (SAI) (FAFSA Simplification Act, part of the Consolidated Appropriations Act of 2021 - PL: 116-260). Like the EFC, the SAI is used to determine a student's eligibility for certain types of federal and state aid. Beginning July 1, 2024, the bill replaces EFC with

SAI.

EFFECTIVE DATE: July 1, 2023

COMMITTEE ACTION

Higher Education and Employment Advancement Committee

Joint Favorable

Yea 22 Nay 0 (03/07/2023)