

# Issue Brief

## Roberta B. Willis Scholarship Program



### The Roberta B. Willis Scholarship Program

The Roberta B. Willis Scholarship Program is the only state-funded scholarship available to Connecticut residents who attend an in-state public or private higher education institution (excluding the regional-community technical colleges). It consists of three types of awards: need-merit, need-based, and Charter Oak grants ([CGS § 10a-173](#), as amended by [PA 23-204](#), § 135, and [PA 23-208](#), § 11).

### State Allocations for the Willis Scholarship Program

The General Assembly allocates funds to the Office of Higher Education (OHE) for the program. OHE keeps some funds to use for need-merit awards and allocates other funds to higher education institutions to distribute for need-based awards and the Charter Oak grant. Table 1 provides the budgeted amounts for the last six fiscal years, along with the percent change from year to year.

For FY 24, OHE must use funds appropriated or allocated for the program to (1) make its awards for the need-based grant and (2) allocate funds for the 2023-24 and 2024-25 academic years for the need-based and Charter Oak grants, so long as it uses all American Rescue Plan Act (ARPA) funds allocated for the program by December 31, 2024 ([PA 23-208](#), § 11).

*Roberta B. Willis served in the Connecticut House of Representatives from 2001 to 2017 and represented the 64th District. She was the House chairwoman of the Higher Education and Employment Advancement Committee and served on the Appropriations and Environment committees.*

**Table 1: State-Budgeted Amount for the Willis Scholarship Program**

Fiscal Year (FY)	Budgeted Amount (\$)	% Change
FY 14	42,132,439	
FY 15	42,023,498	-0.26%
FY 16	39,638,381	-5.68%
FY 17	37,363,944	-5.74%
FY 18	35,345,804	-5.40%
FY 19	33,388,637	-5.54%
FY 20	33,388,637	0%
FY 21	33,388,637	0%
FY 22	33,388,637	0%
FY 23	33,388,637	0%
FY 24*	24,888,637	-25.46%
FY 25*	24,888,637	0%

\*For FYs 24 and 25, \$8.5 million in Willis Scholarship funding that would have been otherwise allocated to the community colleges has been transferred to the Debt Free Community College program.

Source: Office of Fiscal Analysis

## Need-Based Award

### *Eligibility*

The need-based award is available to state residents who are enrolled full- or part-time at public or independent nonprofit four-year Connecticut colleges and universities. Students must have an Estimated Family Contribution (EFC) equal to or below 200% of the maximum EFC eligible for a federal Pell Grant one year prior to the grant year. Beginning July 1, 2024, [PA 23-208](#), § 11, requires OHE to make eligibility determinations based instead on “student aid index” (SAI) to reflect changes in federal law.

### *Award Distribution*

Unlike the need-merit award, the need-based award is distributed by the institutions themselves rather than OHE. The law allows OHE to reserve up to 80% of the entire state appropriation for the Willis Scholarship Program to be used for need-based awards. OHE has a formula for allocating state funds to the institutions so that they can award these grants in students’ financial aid packages. The institutions then follow a formula for determining awards for individual students.

## Need-Merit Award

### *Eligibility*

The need-merit award is available to state residents who are enrolled full- or part-time as an undergraduate student at any four-year Connecticut public or independent college or university. OHE makes the need determination based on the expected family contribution for educational costs as computed from the student’s Free Application for Federal Student Aid (FAFSA) and the merit determination based on high school academic achievement or SAT performance. Awards are renewable with satisfactory academic progress and continuing need ([CGS § 10a-173](#), as amended by [PA 23-208](#), § 11).

### *Award Distribution*

OHE awards the need-merit award directly to student applicants. The law requires OHE to reserve for need-merit awards either (1) at least 20%, but no more than 30%, of the entire state appropriation for the Willis Scholarship Program or (2) \$10 million, whichever is greater. Awards are made on a sliding scale up to a maximum federal EFC set annually by OHE and based on funding levels and the number of eligible applicants. Under [PA 23-208](#), § 11, OHE can also use SAI when making need-merit awards.

## Charter Oak Grant

### *Eligibility*

This grant is available to any full- or part-time undergraduate student enrolled in a degree program at Charter Oak State College. Eligible students must demonstrate substantial financial need.

### *Award Distribution*

The law requires OHE to reserve at least \$100,000 from the entire state appropriation for the Willis Scholarship Program for the Charter Oak grant. This grant is funded through need-based grant distributions to Charter Oak State College. Individual awards cannot exceed a student’s calculated educational costs ([CGS § 10a-173](#), as amended by [PA 23-208](#), § 11).

**Learn  
More**

[Roberta B. Willis Need-Based Grant 2024-2025 Enrollment Information](#)

[Paying for College](#) – Connecticut Office of Higher Education

OLR Report: *Scholarship Transfers*  
([2023-R-0303](#))

