



WASHINGTON
OPPORTUNITY PATHWAYS

**GEAR UP - GET SCHOLARSHIP
PROGRAM MANUAL
2013-14**

**Washington Student
Achievement Council**

CONTACT INFORMATION

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SECTION 1

PROGRAM DESCRIPTION

GEAR UP Overview

Washington State GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) is a college access program administered by the Washington Student Achievement Council in partnership with the Governor’s Office, the University of Washington, the College Success Foundation, the Washington State Employees Credit Union, the Office of the Superintendent of Public Instruction, the Northwest Education Loan Association, and a number of local, state, and national organizations.

Washington was awarded its third consecutive state GEAR UP grant by the US Department of Education in September 2011. The six-year, \$27 million award will be used to provide direct services to 6,000 students in 28 high-poverty school districts statewide.

This funding, combined with other private, partner, state, and school district resources, allows the Council to meet the federal GEAR UP grant’s required dollar-for-dollar cost share, and brings the total value of GEAR UP services to \$9 million per year.

The GEAR UP Scholars Project was one of the services provided to students, families, and teachers through Washington’s second GEAR UP grant, from 2005 – 2011. The project provided comprehensive college preparation and awareness activities to students and their families in 12 districts statewide. Scholars participated in the program beginning in the 7th grade and continued through high school graduation.

The Scholars Project was a program where students discovered the importance of education, improved academic skills, identified career interests, and explored college opportunities.

Class of 2011 Scholars Project GEAR UP – GET Scholarship

Students who participated in the Washington State GEAR UP Scholars Project (2005-2011) were eligible to apply for a GEAR UP Scholarship in the spring of their senior year (2011). The scholarship is funded via Guaranteed Education Tuition (GET) units to pay for college tuition, fees, and related costs.

The Scholars Project graduates from the following school districts were eligible for the scholarship:

Bellingham	Okanogan
Eastmont	Quincy
Everett	Wapato
Federal Way	Wenatchee
Inchelium	West Valley (Spokane)
Monroe	Vancouver

SECTION 2

ELIGIBILITY GUIDELINES AND RULES

Eligibility Requirements

To be eligible for a GEAR UP – GET Scholarship, students must:

1. Have enrolled in the GEAR UP Scholars Project in seventh grade.
2. Have graduated from high school in 2011.
3. Met program requirements (benchmarks) each year of the program.
4. Have achieved a 2.0 cumulative Grade Point Average (GPA) or better in high school.
5. Complete and return a Free Application for Federal Student Aid (FAFSA) to the federal processor.
6. Enrolled in a college by fall 2011.
7. Be enrolled at least half-time.
8. Not be in an unsatisfactory progress-denied condition.

Scholarship Amount

The amount of the scholarship will vary each year. Each student will receive their award in GET units. One GET unit equals 1 percent of the resident undergraduate tuition and state-mandated fees at the most expensive Washington public university at the time of use.

Scholarship Expiration

Students must have begun using their awards by the fall term following their high school graduation (fall 2011). The GEAR UP - GET Scholarship ends when all GEAR UP - GET units are completely used or by June 30, 2015, whichever comes first, (in accordance with the Higher Education Opportunity Act rules).

Students who did not begin using their GET units by fall 2011 (December 31, 2011) and have not received an approval to their Defer Use of Scholarship Request form, forfeit the entire scholarship and will be removed from the eligible student list.

Defer Use of Scholarship Requests forms must have been received by September 1, 2011.

Waiver Requests

Defer Use of Scholarship forms, may be requested for these reasons:

1. Military Service – attach orders.
2. Medical Condition – attach letter from doctor.
3. Other – attach details.

Funds held in reserve that are not used by an eligible student within four years of the student's scheduled completion of secondary school may be redistributed by the Washington Student Achievement Council to other eligible students.

Qualified Educational Expenses

The GEAR UP - GET Scholarship may be used for tuition, state-mandated or college-specific fees, and/or on-campus room and board. Remedial Courses are allowable.

Eligible Institutions

Students who are eligible for a GEAR UP - GET Scholarship may use their scholarship award at any college that participates in federal financial aid programs. For a complete list of eligible schools, visit the U.S. Department of Education's Free Application for Federal Student Aid website at www.fafsa.ed.gov

The institution may disburse funds by providing the student with a direct payment or by crediting the student's account. Public institutions are expected to be consistent with institutional policy on the awarding of federal financial aid. Disbursements may be made only after the school confirms enrollment.

List of Eligible Students

Unlike the GEAR UP Grant I Scholarship, a list of currently eligible students is not available on the Council Portal. The student must self-identify to the financial aid office. Since students must self-request, it is mandatory that the form is signed by a financial aid advisor or officer.

Please contact Kelly Keeney at (360) 753-7838 or gearup@wsac.wa.gov with any questions or concerns regarding student eligibility.

Monitoring Eligibility

Institutions are responsible for monitoring and responding to changes in student eligibility that affect the GEAR UP - GET Scholarship award. Additional information on monitoring can be found on page 5.

Academic Progress Requirement

To remain eligible for the GEAR UP - GET Scholarship, a student must meet their institution's academic progress policy on financial aid awards.

Need vs. Cost of Attendance

According to federal regulation, the GEAR UP - GET Scholarship may exceed a student's financial need, but **may not, in combination with other aid, exceed the student's total cost of attendance.**

The Financial Aid Administrator (FAA) may, using professional discretion, allow the scholarship to replace a portion of the student's Expected Family Contribution (EFC). The FAA may decide to reduce the student's EFC, based on a change in financial circumstances.

For students who demonstrate no financial need, the scholarship should be awarded in a manner similar to other merit-based aid programs, but prorated for less than full-time enrollment.

Packaging the Scholarship

Although the GEAR UP – GET Scholarship is funded using GET, the units are not owned by the individual. As such, the scholarship must be treated as a resource for financial aid purposes.

When you are packaging the GEAR UP - GET Scholarship, we ask that you follow the regulations under 34CFR694.10, and award the GEAR UP - GET Scholarship in the following order:

1. Federal Pell Grant.
2. Other public or private grants, scholarships, or tuition discounts.
3. GEAR UP - GET Scholarship.
4. Other financial assistance, such as loans or work-study.

SECTION 3

MONITORING CONTINUED ELIGIBILITY

Once a student receives the GEAR UP - GET Scholarship award, the institution must monitor for continued eligibility. Students must continue to meet all eligibility requirements as outlined on page 3.

Revised Eligibility

It is recommended to re-evaluate the student's eligibility for the GEAR UP - GET Scholarship whenever a recalculation is required for federal student aid programs.

Satisfactory Academic Progress (SAP)

As outlined in the eligibility guidelines, students cannot receive the GEAR UP - GET Scholarship when they are denied federal or state aid for SAP reasons. At the end of each term, the institution must examine each scholarship recipient's progress and determine whether the student is making satisfactory progress toward his/her program requirements.

Unlike State Need Grant, GEAR UP does not define satisfactory progress. Instead, the academic progress policy of the institution determines the SAP status of each student.

SECTION 4

PAYMENT REQUESTS AND DISBURSEMENT

Upon notification to the financial aid office by the student that they are eligible, and wish to use their GEAR UP - GET Scholarship, the following steps should be followed by the student and the financial aid office:

1. The student should bring a copy of the GEAR UP - GET Scholarship Payment Request Form to the financial aid office.
2. Determine how much the student needs to request each quarter or semester. The amount should not exceed the student's unmet need.
3. The student may request one quarter or semester at a time, but be aware that he or she will need to submit a new form at the beginning of each quarter or semester.
4. Be sure to fill in the date that the payment must be received by the college. This is especially important if the student is requesting for more than one quarter or semester at a time.
5. If the student does request for all quarters/semesters, the payment will be set up to arrive by the requested due date as marked on the form.
6. Sign the form and have the student scan and email, fax, or send it postal mail to:

KELLY KEENEY
Program Specialist
917 Lakeridge Way SW
PO Box 43430
Olympia, WA 98504-3430
Phone: (360) 753-7838
FAX: (360) 753-7808
Email: kellyk@wsac.wa.gov

Disbursement Procedures

Please note that the GEAR UP - GET Scholarship funds will typically be received by the same office that receives traditional GET funds.

The institution may disburse funds by providing the student with a direct payment or by crediting the student's account. Public institutions are expected to be consistent with institutional policy on the awarding of federal financial aid.

Disbursements may be made only after the school confirms enrollment. Warrant amounts must be consistent with enrollment status at the time of the disbursement.

The award should be prorated for half- or three-quarter-time enrollment. The student must be enrolled at least half-time to receive the award.

A student whose off-campus program precludes his/her return to the institution for disbursement may assign Power of Attorney to a responsible person to receive GEAR UP - GET Scholarship payments on his/her behalf. A copy of the Power of Attorney must be kept in the student's file.

Warrants must be disbursed to the student or returned to the Board within 30 days of receipt by the institution.

Returning Unawarded Funds

Unawarded funds should be returned to:

GET
PO Box 43450
Olympia, WA 98504
1-800-955-2318

Responsibility for Warrants

The institution is responsible for GEAR UP - GET Scholarship warrants in its custody, including those that are lost, stolen, destroyed, or disbursed to ineligible students.

Retroactive Payments

Retroactive payments may be made to an eligible student. The value of the retroactive payment for a previous term should be based on the student's rate of satisfactorily completed credits at the end of that term. Students need not be enrolled at the time of the retroactive payment.

Transfer Students

It is the student's responsibility to notify the institution he/she is transferring to and transferring from of scholarship eligibility and intent to transfer.

SECTION 5

DEFINITIONS

Eligible Course of Study

Students may not pursue a theological course of study and receive the GEAR UP - GET Scholarship. Any other course of study is permissible.

Revised Payment

A revised payment or request is one that replaces an earlier warrant drawn for the same term because the student failed to pick it up, or there was a reduction in the student's enrollment status resulting in a reduced scholarship award. For private institutions, the original warrant must be returned to the board for cancellation before a new warrant may be issued.

Satisfactory Academic Progress

Satisfactory Academic Progress will be as defined by the institution. See Section 3 – Monitoring Continued Eligibility for more information.

Supplemental Award

Supplemental awards are additional payment requests processed for the same student for the same term. If it is a payment request in addition to one already received by the Council for that term, the Supplemental Code on the Warrant Request Form should be marked "Yes."

Retroactive payments are not supplemental awards.

Theology Degree

A state statute, applicable to all financial aid programs, addresses the theology issue. RCW 28B.10.814 reads, "No aid shall be awarded to any student who is pursuing a degree in theology."

The decision as to what majors are considered "theology" is left to the individual institutions, which are in the best position to determine the course content of their own major courses of study. The individual institutions must make this determination in light of the Washington State Constitution, which provides at Article 1 11 that no "public money or property shall be appropriated for or applied to any religious worship, exercise, or instruction."

SECTION 6

PAYMENT REQUEST FORM AND INSTRUCTIONS



GEAR UP – GET SCHOLARSHIP PAYMENT REQUEST FORM

Class of 2011 GEAR UP Student: Please submit completed form to:

GEAR UP – GET Scholarship
ATTN: Kelly Keeney
PO Box 43430
Olympia, WA 98504
Fax: 360-704-6238

Account Information:			
Account Owner	<u>Washington GEAR UP Scholars Project</u>	Account Number	<u>05011425</u>
Student Name	_____	Phone Number	_____
Email Address	_____	Social Security Number	_____
Have you filed your Free Application for Free Student Aid (FAFSA) for the academic year you are requesting for? <input type="checkbox"/> YES <input type="checkbox"/> NO			
School Information: I am planning to attend the following college:			
Washington State Public College		Out-of-state College or In-state Private College	
<input type="checkbox"/> Central Washington University		<input type="checkbox"/> Out-of-state College named below:	
<input type="checkbox"/> Eastern Washington University		Name: _____	
<input type="checkbox"/> The Evergreen State College		Address: _____	
<input type="checkbox"/> University of Washington		_____	
<input type="checkbox"/> Washington State University		<input type="checkbox"/> Private College named below:	
<input type="checkbox"/> Western Washington University		Name: _____	
<input type="checkbox"/> Community or Technical College named below:		Address: _____	

Requesting Tuition and Fees: For Academic Year: <input type="checkbox"/> 2011-2012 <input type="checkbox"/> 2012-2013 <input type="checkbox"/> 2013-2014 <input type="checkbox"/> 2014-2015 <input type="checkbox"/> 2015-2016			
<input type="checkbox"/> Fall Quarter/Semester: \$ _____ / Date payment must be received by the college _____	<input type="checkbox"/> Spring Quarter/Semester: \$ _____ / Date payment must be received by the college _____		
<input type="checkbox"/> Winter Quarter: \$ _____ / Date payment must be received by the college: _____	<input type="checkbox"/> Summer Quarter: \$ _____ / Date payment must be received by the college: _____		
This form must be approved and signed by your financial aid counselor, or a financial aid officer, to ensure the amount requested does not exceed unmet need, and/or cost of attendance.			
Financial Aid Officer Signature:		Date:	
INFORMATION RELEASE			
In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), I authorize the Guaranteed Education Tuition Program, GEAR UP, and the college listed above to disclose to each other personally identifiable information, including my Social Security number and any other account information necessary to make a distribution from the GEAR UP Scholars Project GET account. I certify that the information provided on this form is true and correct to the best of my knowledge and belief. I understand that non-qualified distributions may be subject to a penalty and/or federal income tax on the earnings.			
_____		_____	
GEAR UP Student Signature		Date	

GEAR UP/GET Scholarship Payment Request Form Submission Procedure:

1. **Form submission:** Complete the form and mail, email (scan), or fax to address on form.
2. **Account Owner:** The student does not own the account; the account owner is Washington State GEAR UP. This information remains the same on every request.
3. **Account Number:** This is the Washington State GEAR UP GET account number and remains the same on every form.
4. **Student Name:** Student's legal name (first name, last name). If student's name is legally changed during the time he or she is receiving scholarship funds contact the GEAR UP office so scholarship processing information can be updated. The student will need to submit legal proof of name change.
5. **Phone Number:** Student's phone number
6. **Email Address:** Student's most recent email address. Please make sure to print clearly.
7. **Social Security Number:** Student's SSN number. Please do not include SSN if form is being emailed. **An ITIN number is not an acceptable substitute.**
8. **Submission of FAFSA:** The student must have a current FAFSA on file. This is a requirement of receiving the scholarship.
9. **School Information:** The college/university the student is attending or transferring to.
10. **Out of State or Private College:** If the student is attending an out-of-state college or an in-state private college or university, make sure the name and address complete on the request form.
11. **State Public College:** Select the state college from the list on the form. If the student is attending a community or technical college, specify the name of the school on the line provided.
12. **Requesting Tuition and Fees-Academic Year:** Indicate the academic year for which the scholarship funds are being requested.
13. **Quarterly/Semester Amounts:** The quarterly or semester amount the student is requesting.
14. **Date payment must be received by the college:** Date the payment must be received by the college. Please allow two weeks for processing.
15. **Financial Aid Approval:** The student's financial aid counselor, advisor, or financial aid officer **MUST** sign the form before it is submitted. Payment will not be issued without this signature.
16. **FA Signature/Date:** The financial aid administrator/counselor signature & date the form was signed.
17. **Information Release:** Allows GEAR UP/GET and the named college to discuss information pertaining to the student's GEAR UP/GET Scholarship account.
18. **Student Signature:** In order for request to be processed, the student is required to sign the form.
19. **Date:** Date the student signed the form.



GEAR UP – GET SCHOLARSHIP PAYMENT REQUEST FORM

Class of 2011 GEAR UP Student: Please submit completed form to: **GEAR UP – GET Scholarship**
ATTN: Kelly Keeney
PO Box 43430
Olympia, WA 98501
Fax: 360-753-7808

Account Information:	
Account Owner	<u>Washington GEAR UP Scholars Project</u> Account Number <u>05011425</u>
Student Name	_____ Phone Number _____
Email Address	_____ Social Security Number _____
Have you filed your Free Application for Free Student Aid (FAFSA) for the academic year you are requesting for? <input type="checkbox"/> YES <input type="checkbox"/> NO	
School Information: I am planning to attend the following college:	
Washington State Public College <input type="checkbox"/> Central Washington University <input type="checkbox"/> Eastern Washington University <input type="checkbox"/> The Evergreen State College <input type="checkbox"/> University of Washington <input type="checkbox"/> Washington State University <input type="checkbox"/> Western Washington University <input type="checkbox"/> Community or Technical College named below: _____	Out-of-state College or In-state Private College <input type="checkbox"/> Out-of-state College named below: Name: _____ Address: _____ _____ <input type="checkbox"/> Private College named below: Name: _____ Address: _____ _____
Requesting Tuition and Fees: For Academic Year: <input type="checkbox"/> 2011-2012 <input type="checkbox"/> 2012-2013 <input type="checkbox"/> 2013-2014 <input type="checkbox"/> 2014-2015 <input type="checkbox"/> 2015-2016	
<input type="checkbox"/> Fall Quarter/Semester: \$ _____ / Date payment must be received by the college: _____	<input type="checkbox"/> Spring Quarter/Semester: \$ _____ / Date payment must be received by the college: _____
<input type="checkbox"/> Winter Quarter: \$ _____ / Date payment must be received by the college: _____	<input type="checkbox"/> Summer Quarter: \$ _____ / Date payment must be received by the college: _____
This form must be approved and signed by your financial aid counselor, or a financial aid officer, to ensure the amount requested does not exceed unmet need, and/or cost of attendance.	
Financial Aid Officer Signature: _____	Date: _____
INFORMATION RELEASE	
<p>In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), I authorize the Guaranteed Education Tuition Program, GEAR UP, and the college listed above to disclose to each other personally identifiable information, including my Social Security number and any other account information necessary to make a distribution from the GEAR UP Scholars Project GET account. I certify that the information provided on this form is true and correct to the best of my knowledge and belief. I understand that non-qualified distributions may be subject to a penalty and/or federal income tax on the earnings.</p>	
GEAR UP Student Signature _____	Date _____