

Higher Education Coordinating Commission

Office of Student Access and Completion - Chapter 575

Division 31

OREGON OPPORTUNITY GRANT PROGRAM

575-031-0005

Residency

To be eligible for an Oregon Opportunity Grant a student must:

(1)(a) Be a U.S. Citizen or eligible non-citizen as defined by federal regulations under Title IV, Part B of the Higher Education Act of 1965 as amended, and

(b) Be a resident of the State of Oregon as defined in OAR 575-030-0005(1); or

(2) Be exempted from paying nonresident tuition under ORS 352.287 or meet the criteria to be exempted from paying nonresident tuition in ORS 352,287 and provide documents specified in ORS 352.287(1)(c)(A) and (B) or ORS 352.287(2)(c)(A) and (B).

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 12, f. & ef. 12-15-76

575-031-0010

Financial Need

(1) A student must have financial need as determined by the Commission as set forth in OAR 575-030-0005(4).

(2) A student's financial need for purposes of determining eligibility for an Oregon Opportunity Grant shall be based upon provisions of the Shared Responsibility Model as set forth in OAR 575-031-0022 and 0023.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 5-2007, f. & cert. ef. 11-7-07

OSAC 2-2005, f. 9-27-05, cert. ef. 10-1-05

OSAC 1-2005(Temp), f. & cert. ef. 4-4-05 thru 10-1-05

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 3-1978, f. & ef. 2-16-78

SSC 1-1978(Temp), f. & ef. 1-4-78

SSC 18, f. & ef. 10-19-77

SSC 12, f. & ef. 12-15-76

575-031-0015

Institutional Eligibility

Eligible institutions are any Oregon community colleges, Oregon public universities listed in ORS 352.002, Oregon Health and Science University, and Oregon-based non-profit institutions of higher education which:

(1) Are recognized by the U.S. Department of Education as eligible institutions;

(2) Request participation in the program; and

(3) Sign an institutional participation agreement.

Statutory/Other Authority: ORS 348 & 378

Statutes/Other Implemented: ORS 348.250 - 348.260

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2004, f. & cert. ef. 2-12-04

SSC 3-1988, f. & cert. ef. 8-9-88

SSC 5-1987, f. & ef. 10-23-87

SSC 2-1986, f. & ef. 2-25-86

SSC 1-1981, f. & ef. 9-3-81

SSC 18, f. & ef. 10-19-77

SSC 12, f. & ef. 12-15-76

575-031-0016

Eligible Program

To receive an Oregon Opportunity Grant, a student must be enrolled in either:

(1) A program leading to a baccalaureate or associate degree; or

(2) A program at least one academic year in length approved by the U.S. Department of Education for Title IV programs.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 2-1986, f. & ef. 2-25-86

575-031-0020

Enrollment

(1) Except for subsections (2) of this rule, a student must be enrolled or accepted for enrollment as at least a half-time undergraduate student at an eligible institution. In addition, except for (2) below, when funds are not available to award grants to all qualified students, the Commission may give priority to applicants who are or plan to be full-time students at the eligible postsecondary institution where the grant is to be used.

(2) Students whose statutory rights provide for a legitimate need to attend school for less than half-time undergraduate status may be eligible to receive an Oregon Opportunity Grant. These students will not be denied priority status.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 1-2010, f. & cert. ef. 10-6-10

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 18, f. & ef. 10-19-77

SSC 12, f. & ef. 12-15-76

575-031-0022

Definitions for the Shared Responsibility Model

(1) Cost of Education. For purposes of calculating Oregon Opportunity Grant awards under the Shared Responsibility Model, the standard cost of education is based on the definition of cost of education in OAR 575-030-0005.

(a) The standard cost of education for each institutional segment is based on the average of the standard costs for all participating institutions within an institutional segment.

(b) For purposes of calculating Oregon Opportunity Grant awards under the Shared Responsibility Model, the standard cost of education for all public and private independent 4-year institutions is the

average of the standard costs for public 4-year institutions. The standard cost of education for all public 2-year institutions is the average of the standard costs for all institutions in that segment.

(2) "Student Share". The student share is a fixed amount based upon a reasonable amount of paid work and, in some cases, a modest amount of borrowing, depending upon the type of institution the student attends. The Commission adjusts the student share annually according to changes in the Oregon minimum wage and what the Commission determines to be a manageable debt burden for a student. The student's share may consist of any combination of financial resources from the student's work, loans, scholarships, savings, assets, or gift aid.

(a) For a student attending a public 2-year Oregon-based postsecondary institution, the student share is based on income from work. The Commission will annually determine the income from work amount, based on a minimum number of hours per week at Oregon minimum wage.

(b) For a student attending a public or not-for-profit 4-year Oregon-based postsecondary institution, the student share is based on income from work plus a modest loan amount. The Commission will annually determine the work component, based on a minimum number of hours per week at Oregon minimum wage, and the loan amount.

(c) For a student enrolled for 6 to 11 credit-hours, the component of the student share represented by income from work may be higher than for students enrolled full time. The Commission will determine this amount annually.

(d) "Manageable debt burden". The Commission will annually determine a manageable debt burden based on average entry-level salaries for public service occupations in Oregon.

(3) "Family Share". The family share is equal to the student's federally calculated expected family contribution, which is based on the financial resources (income from work and other sources, savings, and/or assets) of the student's parents, if dependent, or the student and spouse, if independent, as reported in the Free Application for Federal Student Aid (FAFSA) or in an alternative need analysis form approved by the Commission.

(4) "Federal Share". The federal share is based on how much the student or the student's family is expected to receive from the federal government in the form of Federal Pell Grants and assumed federal higher education tax credits, as determined by the Commission. The federal share excludes Federal SEOG awards and other federal grant and scholarship programs.

(5) "State Share". The state share is equal to the standard cost of education minus the sum of the student share, the family share, and the federal share. The state share is the maximum amount that a student may receive as an Oregon Opportunity Grant. If the amount of the state share is less than the minimum award amount, as determined by the Commission, the student will receive no award. If total state funding is not sufficient to cover full awards for all eligible students, the state share may be reduced proportionally utilizing a method determined by the Commission.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 2-2008, f. & cert. ef. 8-21-08

OSAC 5-2007, f. & cert. ef. 11-7-07

575-031-0023

Implementation of Shared Responsibility Model

Effective starting with the 2008-09 academic year, the Shared Responsibility Model shall be the method for determining a student's eligibility for the Oregon Opportunity Grant and the student's annual award amounts. Under this methodology, a qualified student's cost of education is shared with the student, the student's family, the federal government, and the state. The amount of a student's grant is equal the state's share of the student's cost of education, as determined by the Commission, up to the maximum annual award amount for the academic year.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 5-2007, f. & cert. ef. 11-7-07

575-031-0025

Opportunity Grant Amount

(1)(a) For students attending a public 2- or 4-year Oregon-based postsecondary institution, award amounts prior to the 2008-09 academic year are based upon a fixed percentage of the average tuition and standard fees plus the weighted average of nontuition costs across all institutional segments.

(b) For students attending a private nonprofit 4-year Oregon-based postsecondary institution, award amounts prior to the 2008-09 academic year are based upon a fixed percentage of the average tuition and standard fees at each institution plus the weighted average of nontuition costs across all institutional segments.

(c) An Oregon Opportunity Grant may vary in amount from \$100 to an annual maximum award amount, as determined by the Commission.

(d) Effective starting with the 2008-09 academic year, an Oregon Opportunity Grant is based upon the state share, as calculated under provisions of the Shared Responsibility Model.

(2) Within the funds available, an Oregon Opportunity Grant for a student who is taking from 6 to 11 credit hours in a term or semester shall be 50 percent of the award made to a full-time student enrolled at the same institution.

(3) For concurrently enrolled students, the amount of the Oregon Opportunity Grant will be based on the school disbursing funds, unless otherwise approved by the Commission.

(4) In the event that the Commission determines that the total amount available to award as the state share to all qualified students is not sufficient to cover the total state share amount scheduled to be awarded to all students, the Commission will implement one or more of the following strategies to limit awards. Examples of such strategies may include, but are not limited to, the following:

(a) The Commission may limit awards to only students who are enrolled full time;

(b) The Commission may implement reductions of all awards using progressive prorata reductions based on a percentage of the student's expected family contribution;

(c) The Commission may prescribe a specific date by which a student must apply to the Commission to qualify for a grant and may prescribe an additional date by which the award must be disbursed by school officials to the student.

(d) The Commission may make per capita reductions to future student grants if appropriations are determined to be inadequate to the needs of all eligible students whose applications are received by the announced application deadline for a specific academic year. When future disbursements of student grants are reduced, the Commission will provide notification it deems adequate, to college and university financial aid offices and affected students.

(e) The Commission may base a recipient's maximum authorized award each term on the recipient's fall-term enrollment status if funds are not available to award grants to all qualified students whose applications are received by the announced application deadline for a specific academic year.

(f) The Commission may prioritize awards to qualified students with the greatest financial need or whose circumstances would enhance the promotion of equity guidelines published by the Commission.

(5) Awards for continuing students who first received an Oregon Opportunity Grant in 2015-16. Notwithstanding paragraph (1)(d) above, the Commission may authorize awards for qualified students who attended an eligible postsecondary institution at least half time during the 2015-16 academic year and remain continuously enrolled at least half time at an eligible Oregon postsecondary institution if the students continue to qualify for an Oregon Opportunity Grant according to awarding procedures used for the 2015-16 academic year.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 1-2010, f. & cert. ef. 10-6-10

Reverted to OSAC 5-2007, f. & cert. ef. 11-7-07

OSAC 1-2009(Temp), f. & cert. ef. 11-24-09 thru 5-17-10

OSAC 5-2007, f. & cert. ef. 11-7-07

OSAC 4-2005, f. 9-27-05, cert. ef. 10-1-05

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 1-1998, f. & cert. ef. 3-18-98

SSC 2-1995, f. & cert. ef. 12-6-95

SSC 3-1994, f. & cert. ef. 1-25-94

SSC 1-1993(Temp), f. & cert. ef. 9-20-93

SSC 5-1987, f. & ef. 10-23-87

SSC 2-1985, f. & ef. 4-17-85

SSC 2-1979, f. 7-24-79, ef. 8-1-79

SSC 3-1978, f. & ef. 2-16-78

SSC 1-1978(Temp), f. & ef. 1-4-78

SSC 18, f. & ef. 10-19-77

SSC 12, f. & ef. 12-15-76

575-031-0030

Conditions of Award

(1) To apply for an Oregon Opportunity Grant, a student must complete and submit the Free Application for Federal Student Aid for each academic year, if eligible to file the application, or submit an alternate need analysis form approved by the Commission for this purpose.

(2) Except for subsection (2) below, the maximum period of Oregon Opportunity Grant eligibility shall not exceed the equivalent of 12 quarters or 8 semesters of full-time enrollment.

(3) Students whose statutory rights provide for a legitimate need to extend the maximum period beyond a period equal to 12 quarters or 8 semesters of full-time enrollment remain eligible to receive an Oregon Opportunity Grant until completion of their undergraduate program.

(4) The Commission may deny renewal of an award to any student failing to make satisfactory academic progress.

(5) No Oregon Opportunity Grant shall be made to any student enrolled in a course of study required for and leading to a degree in theology, divinity, or religious education.

(6) No Oregon Opportunity Grant shall be made to any student in default on any federal Title IV loan or owing a refund on federal Title IV funds previously disbursed, unless the institution disbursing funds determines that the student has made satisfactory arrangements to repay and has regained federal eligibility.

(7) An Oregon Opportunity Grant recipient shall sign a statement of Selective Service Registration Compliance in conformity with the requirements of Title IV student aid programs.

(8) An Oregon Opportunity Grant recipient must be enrolled in an eligible program as defined in 575-031-0016.

(9) An Oregon Opportunity Grant recipient must be an undergraduate student, as defined by the institution disbursing funds.

(10) An Oregon Opportunity Grant recipient may apply for renewal of the grant on an annual basis until the student has received grant funding for the maximum period noted in subsection (1) above. The Commission may not renew the grant if the recipient has not made timely application for renewal of the grant.

(11)(a) The Commission will renew an Oregon Opportunity Grant for a second year of attendance if the grant recipient makes a timely application for renewal of the grant, meets academic standards and benchmarks established by the Commission, and continues to meet all other grant eligibility criteria.

(b) The Commission may continue to renew the grant after the second year if the grant recipient continues to apply timely and meet all academic and other grant eligibility requirements. Additional requirements may include applying by an established application deadline and meeting academic standards and benchmarks that exceed federal requirements for satisfactory academic progress.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 5-2007, f. & cert. ef. 11-7-07

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 3-1988, f. & cert. ef. 8-9-88

SSC 5-1987, f. & ef. 10-23-87

SSC 5-1986, f. & ef. 6-12-86

SSC 2-1985, f. & ef. 4-17-85

SSC 4-1983, f. & ef. 11-29-83

SSC 1-1981, f. & ef. 9-3-81

SSC 4-1980, f. & ef. 10-22-80

SSC 18, f. & ef. 10-19-77

SSC 12, f. & ef. 12-15-76

575-031-0045

Disbursements

(1) Institutions shall disburse grants to students identified by the Commission from funds provided by the Commission on an academic term basis.

(2) Institutions shall not disburse grants to students who cease to meet conditions of award identified by the Commission.

(3) If, as a result of an institutional error, grants are disbursed to ineligible students, to students in ineligible programs, or to students for an inappropriate number of terms, the institution shall reimburse the State of Oregon the full amount of monies erroneously disbursed.

(4) Institutions shall disburse grants to eligible students within a time schedule established annually by the Commission.

(5) Institutions shall submit regular reports to the Commission regarding disbursements made to eligible students on a schedule determined by the Commission.

(6) Institutions shall refund unused grant funds to the Commission within a time schedule established annually by the Commission.

(7) Generally, a disbursement may not be made to a student who is no longer eligible. An otherwise eligible student becomes ineligible for an Oregon Opportunity Grant on the date that the student is no longer enrolled at the institution for the award year. With Commission approval, institutions may make late disbursements of retroactive awards for prior academic terms up to 60 days after the close of the year-end account reconciliation process or up to 60 days after the end of the student's period of enrollment, whichever is earlier.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 1-2015, f. & cert. ef. 12-18-15

OSAC 5-2007, f. & cert. ef. 11-7-07

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 5-1986, f. & ef. 6-12-86

SSC 1-1981, f. & ef. 9-3-81

SSC 4-1980, f. & ef. 10-22-80

575-031-0046

Student Information

(1) The institution shall provide each student awarded at that institution with written notification on items specified by the Commission.

(2) The institution shall report to the Commission certain grant recipient data to include, at a minimum, the following:

(a3) The enrollment status and amount of OOG funds disbursed each term to each grant recipient.

(b4) Each grant recipient's self-reported race or ethnicity, according to federal guidelines.

(c5) Each grant recipient's grade level and total credits earned to date at the start the academic year.

(d6) Each grant recipient's progress toward completion of a course of study leading to a certificate, degree, or transfer.

(37) For each student who has applied for a renewal of the grant, the institution shall confirm the student's satisfactory academic progress, as defined by the postsecondary institution the student attends.

(4) The HECC will use available data, as well as data from other sources such as the National Student Clearinghouse (if necessary), to produce a report to measure academic success and performance in accordance with ORS 348.260.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 1-2016, f. & cert. ef. 4-21-16

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 3-1988, f. & cert. ef. 8-9-88

SSC 5-1987, f. & ef. 10-23-87

SSC 5-1986, f. & ef. 6-12-86

SSC 2-1985, f. & ef. 4-17-85

SSC 1-1981, f. & ef. 9-3-81

575-031-0050

Record Keeping

(1) Each institution shall maintain sufficient records to document its activities relating to the program.

(2) Each institution shall make its academic and financial records available to the Commission at reasonable times for the purpose of assuring that the institution is complying with the rules relating to the administration of the program.

(3) Institutions shall retain the academic and financial records relevant to a disbursement of state grant funds for not less than three years following the end of the fiscal year in which that disbursement occurs.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348

History:

OSAC 6-2002, f. & cert. ef. 3-12-02

SSC 1-1981, f. & ef. 9-3-81

SSC 4-1980, f. & ef. 10-22-80

575-031-0055

Appeals

An institution shall have the right to appeal to the Commission in the instance of a disagreement with a policy or procedure of the Commission or its staff. In such a case, the decision of the Commission is final unless a court of competent jurisdiction orders to the contrary.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348.250 - 348.260

History:

SSC 4-1980, f. & ef. 10-22-80

575-031-0060

Awarding Priorities

(1) In years when the Oregon Opportunity Grant program does not have sufficient funding to serve all eligible Oregon students, the Commission will prioritize awarding of grants to eligible current foster children and former foster children, as determined by the Department of Human Services. Under this rule, the Commission will consider eligible foster youth and former foster youth for prioritized awards throughout the academic year, providing they meet all other eligibility criteria.

(2) Effective starting with the 2016-17 academic year, in years when funds are not sufficient to serve all eligible students, the Commission will prioritize awarding of Oregon Opportunity Grants to qualified students with the greatest financial need or whose circumstances would enhance the promotion of the Commission's equity guidelines:

(a) The Commission will prioritize awards based upon a student's federally calculated expected family contribution, or equivalent until funds are exhausted.

(b) The Commission will accept and process applications for Oregon Opportunity Grants throughout the academic year. In years when the Opportunity Grant program does not have sufficient funding to serve all eligible Oregon students, the Commission may suspend awarding when it deems necessary.

Statutory/Other Authority: ORS 348

Statutes/Other Implemented: ORS 348.250 - 348.260

History:

OSAC 1-2016, f. & cert. ef. 4-21-16