

5 Goal 2: Financial Aid Awareness

5.1 Achievement Grant

The Montana State GEAR UP Achievement Grant is an exciting opportunity for 11th grade students to get a head start on paying for their education. The \$1,000 grants may be used at any eligible college, university or proprietary institution located in the United States.

Application Process

- The Montana Guaranteed Student Loan Program (MGSLP) administers the program in partnership with Montana GEAR UP.
- MGSLP sends application materials to GEAR UP liaisons in October with a due date back to MGSLP one month later.
- Liaisons distribute the application packets to eligible 11th grade students. Completed application packets include 1) application form, 2) high school transcript, 3) projected course list for the current and three remaining semesters.
- Several days before the applications are due back to MGSLP, liaisons review the applications to make sure the applications are complete, that students have the required 2.00 GPA, and that they are taking a college preparatory curriculum.
- Liaisons send the Achievement Grant applications back to MGSLP.
- MGSLP reviews the applications to verify qualification for the grant. In January, the eligible applicants are notified by mail. The liaisons are also notified of the successful applicants.
- Students may request their grant funds approximately three months prior to enrollment in college.

Eligibility Requirements for the student to apply:

- Must be a cohort student enrolled as an 11th grader in a Montana GEAR UP school.
- Must be enrolled and on track to complete the accepted college preparatory curriculum.
- Must have a cumulative 2.0 GPA at the end of the 4th semester of high school.
- Must be enrolled in a GEAR UP school for at least two years, beginning no later than the 8th grade.
- Note – the eligibility requirements are for students from the 1999 GEAR UP grant.

To receive a GEAR UP Achievement Grant a student must:

- Complete college preparatory courses (students who have not met the math requirements but will have completed two advanced math courses by high school graduation are encouraged to apply);
- Have a cumulative 2.0 grade point average (GPA) upon high school graduation;

- Be enrolled in a postsecondary education program within 18 months of high school graduation; and
- Use the funds in their account towards the cost of higher education

5.2 Disbursement of Funds

Students selected to receive Montana GEAR UP Achievement Grants and Pathways Scholarships as well as Montana Guaranteed Student Loan Program Essay Contest Awards may request the funds approximately 3 months prior to enrollment in a postsecondary institution. The form to request funds, “Notice of Intent to Enroll in College,” is available on the Montana GEAR UP website. Once the form is submitted, the Montana Guaranteed Student Loan Program (MGSLP) Scholarship Coordinator will review the form, make sure the student is still eligible and then notify the designated institution. Once the financial aid office at the institution has notified the MGSLP Scholarship Coordinator that the student is eligible to receive funds, the Scholarship Coordinator will request that the funds be sent to the designated institution for disbursement. The institution will release the funds to the student per their disbursement policy.

5.2.1 Request for Disbursement Form

NOTICE OF INTENT TO ENROLL IN COLLEGE

Please complete and return to:
MGS/SLP/OCHE
Attn: Janice Kirkpatrick
P.O. Box 203101
Helena, Montana 59620-3101
Fax: (406) 444-1869

PLEASE PRINT CLEARLY OR TYPE

DATE: _____

1. Student's Name: _____
First Middle Last

2. Parent's Name: _____
First Middle Last

3. Student's Mailing Address: _____
Street City State Zip

4. Student's Social Security Number: _____ 5. Date of Birth: _____ 19____
(SSN Required Prior to Disbursement of Funds)

6. Telephone () _____ Email _____

7. Schools Attended:

8A Name of GEAR UP K-8 or Middle School:	City:	State:	Dates Attended:
8B Name of High School:	City:	State:	Date You Expect to Graduate:

8. Check award received, amount of award and year(s) awarded:

- GEAR UP Achievement Grant Amount: _____ Year: _____
- GEAR UP Pathways Scholarship Amount: _____ Year: _____
- Essay Contest Winner Amount: _____ Year(s): _____
- GEAR UP High School Summer Programs Amount: _____ Year: _____

9. Your career goals: _____

10. Please indicate the college you plan to attend and anticipated enrollment date:

Name of College: _____

Address of College: _____

City: _____ State: _____ Zip: _____

Anticipated Enrollment Date: _____

By signing this application I authorize my middle school, high school, and/or other educational institution to provide any necessary documents or information to the Office of Commissioner of Higher Education to confirm my eligibility for this award. ***I certify that the information is true and correct to the best of my knowledge.***

Applicant's Signature

Date

If you have any questions, please contact Janice Kirkpatrick or Tana Craigle at 1-800-537-7508.

January 5, 2007

5.2.1.1

5.2.2 Request for Disbursement Procedures

PROCEDURE TO FOLLOW IN THE DISBURSING OF SCHOLARSHIP FUNDS ONCE “NOTICE OF INTENT TO ENROLL IN COLLEGE” FORM RECEIVED

- **GEAR UP Essay – disbursed by MGSLP**
 - **GEAR UP Achievement Grant – disbursed by Kelly Hert/OCHE**
 - **GEAR UP Pathways Scholarship – disbursed by Kelly Hert/OCHE**
1. Scholarship Specialist verifies student has been awarded either the GEAR UP Achievement Grant, Pathways Scholarship, or Essay Contest
 2. Scholarship Specialist verifies the college listed on form is an accredited institution
 3. Scholarship Specialist will contact the high school student graduated from and get a copy of high school transcript, once transcript received:
 - a. Verify student graduated from high school with a 2.0 cumulative GPA
 - b. Verify student completed college preparatory requirements
 - c. Verify student enrolling in a postsecondary institution within 18 months of high school graduation
 - i. If at the time the Achievement Grant application packet is reviewed for college preparatory requirements (based on transcript through the first half of the junior year and 3 remaining semesters (6th, 7th, and 8th), & those requirements have **not** been met, send a “*sorry letter, did not meet college prep requirements*”
 - ii. However student may appeal this letter if planning to attend a 2-yr college because college prep requirements differ for 2-yr institutions ***student can appeal as soon as he receives this letter or after “intent to enroll” form received**
 - iii. If on the “*Intent to Enroll*” form student lists a 4-yr institution, and his transcript and course list indicate the college preparatory requirements have **not** been met, send due diligence letter stating reason for non-award
 - iv. If on the “*Intent to Enroll*” form student indicates attending a 2-yr institution, and his transcript and course list indicate college preparatory requirements have **not** been met, send due diligence letter “*not awarded Achievement Grant – however if planning to attend a 2-yr college, reviewing your course list an option etc*” (reasoning behind this – while attending a 2-yr college you are completing college prep requirements for a 4-yr college) in this instance student must send an **APPEAL LETTER** stating “please reconsider me for the Achievement Grant because attending a 2-yr college has different enrollment requirements”
 4. If student awarded GEAR UP Pathways Scholarship or Essay Contest, Scholarship Specialist puts \$ amount on “Notice of Intent to Enroll in College” form
 5. If student awarded a GEAR UP Achievement Grant, look at award letter in recipients folder to see if interest should be accrued, Scholarship Coordinator will use the interest calculation formula to add interest to the \$1,000 Achievement Grant

6. If student awarded a GEAR UP Essay Contest, look at excel essay contest spreadsheet under “scholarships and grants” to see how much interest should be accrued, Scholarship Coordinator will use the interest calculation formula to add interest to the \$250 Essay Contest award
7. Scholarship Coordinator sends an email to either the MGSLP/disb or Kelly Hert/OCHE requesting funds and will cc: Scholarship Specialist
8. Scholarship Coordinator will update Access database with date funds requested and \$ amount
9. Scholarship Coordinator gives all documents back to Scholarship Specialist and once the MGSLP/disb or Kelly Hert/OCHE notifies the Scholarship Specialist of the IUJ# or warrant #, copies of the email, IUJ, or warrant are made for student files
10. Scholarship Specialist will update Access database with actual IUJ# or warrant # and dates those documents sent
11. If funds went out on a warrant, a “*notice of receipt*” letter will accompany the warrant and a copy made. The financial aid office is instructed to sign and return to the MGSLP the “*notice of receipt*” letter once the warrant received in their office
12. Once the MGSLP receives the signed/original “*notice of receipt*” letter back from the financial aid office, replace copy with original.
13. If the MGSLP does not receive the signed/original “*notice of receipt*” within 2 weeks, follow up with phone call and research, may have to do a stop payment and reissue