

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION

Policy and Procedures Manual

SUBJECT: FINANCIAL AFFAIRS

Policy 940.13 – Tuition Waivers and Discounts

**Adopted: October 28, 1977; Revised: May 24, 2013; Revised: July 13, 2018; Revised: September 12, 2019; Revised November 22, 2019**

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I. Board Policy

A. The campuses of the Montana University System are authorized to waive tuition in accordance with this policy. The Commissioner of Higher Education is responsible for the general administration of this policy.

B. The objectives of this policy are to:

1. assure a uniform and equitable administration of tuition waiver policies for students at the campuses of the Montana University System,
2. increase accessibility to public higher education for citizens who would not be able to matriculate or to continue an educational program without financial assistance,
3. recognize meritorious achievement or service, whether academic or through exceptional accomplishment, by students in the Montana University System,
4. maintain fiscal responsibility by insuring that other sources of financial assistance are explored and utilized prior to the waiver of tuition which reduces funds for the operation of the Montana University System, and
5. ensure that the allocation of waivers is made in accordance with federal law, specifically Title IX of the Higher Education Amendments of 1972.

C. Under this policy, only tuition will be waived. No fees, mandatory or miscellaneous, or program fees or other charges are waived by this policy.

D. Self-Supporting courses. Waivers awarded under this policy cannot be applied to self-supporting courses. Student with waivers under this policy will be required to pay the full tuition and fees for the self-supporting course.

E. Summer session. Any category of waiver granted to students during summer session shall be included in computations of each unit's allowable limit. Summer semester is considered the first semester of the fiscal year.

F. Board of Regents Designated Tuition Waivers. The Board of Regents hereby directs the campuses to grant waivers of undergraduate tuition for Montana resident students enrolled in the following categories at campuses of the Montana University System:

1. Montana University System Honor Scholarships. Recipients of a Montana University System Honor Scholarship are eligible for a tuition waiver.

History:

(Item 5-006-R0774), Policy Regarding Fee Waivers, Montana University System, as amended June 7, 1976 (Rescinded); (Item 18-005-R1077), October 28, 1977, as revised January 16, 1978, April 11, 1978, January 21, 1983, January 30, 1984, November 4, 1988, June 21, 1989, April 26, 1990, July 31, 1990, November 9, 1990, March 22, 1991, July 30, 1992, November 11, 1993, July 7, 1994, November 20, 1997, May 21, 1998, November 18, 1999 (Item 104-103-R0999), November 16, 2001 (Item 113-109-R1101), January 18, 2002 (Item 114-103-R0102), March 22, 2002 (Item 113-108-R1101), May 24, 2002 (Item 114-101-R0302), March 20, 2003 (Item 118-103-R0303) and as revised by the Task Force on Fees Report approved by the Board of Regents on March 24, 2000 with an effective date of Academic Year 2002. Item 135-114-R0507 approved by the Board of Regents on May 31, 2007, with an effective date of Fall Semester 2007. Item 156-104-R0912, Revised September 20, 2012. Item 159-105-R0513, revised May 24, 2013. Item 180-102-R0718, revised July 13, 2018. Item 184-101-R0919, Revised September 12, 2019. Item 185-103-R1119; revised November 22, 2019.

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2. 2 Plus 2 Honor Scholarships. Recipients of a 2 Plus 2 Honor Scholarship are eligible for a tuition waiver.
3. Honor Scholarship for National Merit Scholarship Semi-Finalists. National Merit Scholarship semi-finalists from Montana are eligible for a waiver through the first academic year (2 semesters) of enrollment exclusive of any credits earned prior to high school graduation. The holder of the scholarship must enter one of the Montana University System campuses or Dawson Community College, Flathead Valley Community College or Miles City Community College within nine months after high school graduation. A satisfactory standard of scholarship must be maintained as prescribed in § 9(b), "Continued Eligibility for Waiver." The scholarship is not transferable to another person and becomes void three years from the date of issue.
4. American Indian Waiver. Persons who have one-fourth (1/4) American Indian blood or more or are enrolled members of a state recognized or federally recognized Indian tribe which is located within the boundaries of the State of Montana are eligible for a waiver upon demonstration of financial need. "Financial need" is defined as having at least one dollar of remaining need after subtracting Expected Family Contribution, all Title IV grant aid and institutional aid from the cost of attendance. Duplication of tuition designated awards is not allowed.
5. Faculty and Staff Tuition Waiver. Tuition may be waived for permanent University System employees who are employed at least  $\frac{3}{4}$  time for the entire period of enrollment. Permanent employees employed at least  $\frac{3}{4}$  time for the entire academic year who are reemployed for the following academic year are eligible for a tuition waiver during the intervening summer term. Each campus may at its discretion also waive other fees, but in no case may registration and building fees be waived. Each campus may adopt regulations to limit the amount of credit an employee or staff member may register for and to control the times at which courses may be taken.
6. Honorably Discharged Veteran Waiver.
  - a. Veterans From the Vietnam Era and Before (i.e., served any time prior to May 8, 1975) - All honorably discharged persons who served with the United States forces in any of its wars and who are bona fide residents of the State of Montana for fee and tuition purposes are eligible for a waiver. This waiver shall not apply to persons who qualify for education stipends or other veterans' educational benefits under federal law or regulation and shall apply only to those who have at some time qualified for benefits but whose benefits have expired or been exhausted.

**History:**

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b. Post-Vietnam Era Veterans (i.e., service began after May 7, 1975) - Veterans serving in the armed forces subsequent to the conflict in Vietnam are eligible for a waiver if the following conditions are met:

- 1) a) The veteran has been awarded an Armed Forces Expeditionary Medal, or
  - b) The veteran served in a combat theater in the Persian Gulf between August 2, 1990 and April 11, 1991 and received the Southwest Asia Service Medal, or
  - c) The veteran has been awarded the Kosovo Campaign Medal; or
  - d) The veteran served in a combat theater in Afghanistan or Iraq after September 11, 2001 and received either the Global War on Terrorism Expeditionary Medal, the Afghanistan Campaign Medal or the Iraq Campaign Medal.
- For purposes of this policy any of the above noted medals shall be deemed to have been “awarded” to an individual if the individual was eligible for the medal but chose to receive another medal in lieu thereof.
- 2) The veteran is pursuing his or her initial associate degree or initial baccalaureate degree.
  - 3) The veteran elected to become eligible for educational benefits under Title 38, Chapter 30 or 32, of the United States Code (or a successor federal program granting educational benefits based on active duty in the regular armed forces of the United States) and has exhausted such benefits or is no longer eligible for such benefits because of the passage of time. Participants in the Veterans Educational Assistance Program (VEAP) or any similar contributory program who withdraw any portion of their contribution before the expiration date for their benefits are not eligible for the waiver.
  - 4) The veteran is a resident of Montana eligible for in-state tuition and fees under the policies of the board.

7. War Orphans Waiver. A waiver is available, with the approval of the Commissioner of Higher Education, for children aged 25 and under of members of the armed forces of the United States who served on active duty during World War II, the Korean, Vietnam, Iraq or Afghanistan conflicts. Such members of the armed forces must be Montana residents at the time of entry into service and must have been killed in action or died as a result of combat related injury, disease, or other disability while in the service.

8. Surviving Dependents of Montana National Guard Member Waiver. The surviving spouse or child of any Montana National Guard member killed as a result of injury, disease, or other disability incurred in the line of duty while serving on state active duty is eligible for a waiver. This waiver shall not apply to the extent that any such person is eligible for educational benefits from any governmental or private benefit program that provides comparable benefits.

9. September 11, 2001 Victims Waiver. Persons whose spouse, parent, or legal guardian was a

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victim of the September 11, 2001 terrorist actions at the New York World Trade Center, the Pentagon or the Pennsylvania airplane crash are eligible for the waiver. "Victim" as used herein means a person killed as a direct result of physical injuries suffered on or about September 11 directly related to the above noted terrorist actions and includes rescuers, relief workers or fire and police personnel. It does not include any individual identified by federal law enforcement personnel as likely perpetrators of the terrorist activities. If a person is eligible for other grants or scholarships based on the individual's relationship to a victim, which assistance may be used for attendance within the Montana University System, the waiver shall be available only if the individual has fully pursued this alternative source of student assistance and only to the extent that the alternative aid does not cover charges otherwise waivable under this policy. This provision will automatically expire on May 30, 2010.

10. Surviving Dependents of Montana Firefighters/Peace Officers Waiver. The surviving spouse or child of any Montana firefighter or peace officer killed in the course and scope of employment is eligible for a waiver. This waiver shall not apply to the extent that any such person is eligible for educational benefits from any governmental or private benefit program that provides comparable benefits.
11. Montana National Guard Waiver. Beginning in Fall Semester 2020, a student who is a member of the Montana National Guard is eligible for a tuition waiver, provided the student:
  - a. Is a bona fide member of the Montana National Guard at the start of the semester for which the student is enrolling;
  - b. Has been certified as a Montana National Guard member in good standing by the Adjutant General;
  - ~~c. Does not hold a baccalaureate degree or higher;~~
  - ~~d.c.~~ Meets all admission requirements of the institution.

Waivers for students who meet the criteria above will be applied as last dollar awards, up to the total annual cost of resident tuition only. Thus, individual tuition waiver amounts will vary, depending on the amount of federal grants and scholarships received by the student.

Montana National Guard members who do not meet the residency requirements provided BOR Policy 940.1, but meet the criteria above, are eligible for the tuition waiver under this policy.

G. Campus Discretionary Waivers and Discounts. Campuses of the Montana University System may waive tuition, on a full or partial basis, for superior academic achievement, service to the campus, and/or other meritorious accomplishment or student financial need.

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1. Resident Student Waivers/Discounts. Tuition may be waived/discounted for under-graduate or graduate resident students.
2. Non-Resident Student Waivers/Discounts. Tuition may be waived/discounted for non-resident students. The Montana University System must ensure that the average net tuition revenue per non-resident student (not including WUE students) exceeds the average net tuition revenue plus state appropriations per resident student. In other words, net educational revenues per student FTE must be greater for the non-resident student population than the resident student population.
3. Yellow Ribbon. Tuition may be waived for qualified veterans in accordance with an authorized Yellow Ribbon Program.

#### H. Rules Applicable to all Waivers/Discounts.

1. Financial Need. All waivers, except Honor Scholarships for National Merit Scholarship semi-finalists, MUS Honor Scholarships, 2 Plus 2 Honor Scholarships, and waivers for graduate teaching assistants and graduate research assistants shall include financial need as a criterion whenever possible.
2. Continued eligibility for waiver. Students are eligible for continuation of a waiver, from year to year, unless otherwise limited, provided reasonable academic progress is maintained in accordance with the campus's satisfactory progress policy generally used in administering federal financial aid. This provision does not apply to senior citizens and faculty and staff waivers.
3. Waiver Amount Limit. No combination of waivers/discounts can exceed the total tuition charged by the campus.

#### II. Procedures

A. Authorizing official. The Financial Aid Director at each campus shall be the official authorized to award financial assistance, including tuition waivers and scholarships, to any student. No notice or authorization of financial assistance including tuition waivers and scholarships shall be communicated to a student except by authorization from the Financial Aid Director.

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B. Reporting and review:

1. Each unit of the Montana University System will report annually to the Commissioner of Higher Education concerning waivers on forms provided.
2. The president or chancellor of each campus, with the assistance of the financial aid director, shall annually review financial aid practices to insure that waivers are allocated in accordance with applicable policy.
3. The administration of this policy will be reviewed periodically by the Commissioner of Higher Education to insure that no inequities, misinterpretations or misapplications have occurred and to assist in alleviating any problems.

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