



General Assembly

January Session, 2025

Committee Bill No. 5

LCO No. 4633



Referred to Committee on HIGHER EDUCATION AND
EMPLOYMENT ADVANCEMENT

Introduced by:
(HED)

***AN ACT CONCERNING HIGHER EDUCATION AFFORDABILITY AND
ACCOUNTABILITY.***

Be it enacted by the Senate and House of Representatives in General
Assembly convened:

1 Section 1. Section 10a-173 of the general statutes is repealed and the
2 following is substituted in lieu thereof (*Effective July 1, 2025*):

3 (a) For the purposes of this section:

4 [(1) "Family contribution" means the expected family contribution for
5 educational costs as computed from a student's Free Application for
6 Federal Student Aid;]

7 [(2)] (1) "Student aid index" means the index used to determine
8 eligibility for financial aid as computed from a student's Free
9 Application for Federal Student Aid;

10 [(3)] (2) "Eligible student" means a student who is (A) a resident of
11 the state, (B) enrolled at an institution of higher education in a course of
12 study leading to such student's first associate or bachelor's degree, and
13 (C) carrying, for a full-time student, twelve or more semester credit

14 hours, or, for a part-time student, between six and eleven semester
15 credit hours at such institution of higher education;

16 [(4)] (3) "Independent institution of higher education" means a
17 nonprofit institution established in this state (A) that has degree-
18 granting authority in this state; (B) that has its main campus located in
19 this state; (C) that is not included in the Connecticut system of public
20 higher education; and (D) whose primary function is not the preparation
21 of students for religious vocation;

22 [(5)] (4) "Public institution of higher education" means the constituent
23 units of the state system of higher education identified in subdivisions
24 (1) and (2) of section 10a-1, except the regional community-technical
25 colleges; and

26 [(6)] (5) "Eligible educational costs" means the tuition and required
27 fees for an individual student that are published by each public or
28 independent institution of higher education participating in the grant
29 program established under this section, plus a fixed amount for
30 required books and educational supplies as determined by the Office of
31 Higher Education.

32 (b) The Office of Higher Education shall establish the Roberta B.
33 Willis Scholarship program to annually make need-based financial aid
34 available for eligible educational costs to eligible students enrolled at
35 Connecticut's public and independent institutions of higher education.
36 Within available funds, the Roberta B. Willis Scholarship program shall
37 include a need and merit-based grant, a need-based grant and a Charter
38 Oak grant. The need and merit-based grant shall be funded at not less
39 than twenty per cent but not more than thirty per cent of available funds
40 or ten million dollars, whichever is greater. The need-based grant shall
41 be funded at up to eighty per cent of available funds. The Charter Oak
42 grant shall be not less than one hundred thousand dollars of available
43 funds. There shall be an administrative allowance based on one-quarter
44 of one per cent of the available funds, but not less than one hundred
45 thousand dollars annually. The Office of Higher Education shall

46 disburse the funds appropriated or allocated for the Roberta B. Willis
47 Scholarship program for the fiscal years ending June 30, 2024, and June
48 30, 2025, to make awards pursuant to subsection (c) of this section and
49 allocate funds pursuant to subsections (d) and (f) of this section in
50 accordance with a plan developed by the office, provided the office shall
51 (1) disburse all funds allocated for the Roberta B. Willis Scholarship
52 program from the federal funds designated for the state pursuant to the
53 provisions of Section 602 of Subtitle M of Title IX of the American Rescue
54 Plan Act of 2021, P.L. 117-2, as amended from time to time, on or before
55 December 31, 2024, and (2) in accordance with subsection (f) of section
56 4-89, reserve an amount of not more than fifteen million dollars from the
57 amount appropriated for the Roberta B. Willis Scholarship program for
58 the fiscal year ending June 30, 2025, for disbursement during the fiscal
59 year ending June 30, 2026. For the fiscal year ending June 30, 2026, and
60 each fiscal year thereafter, the Office of Higher Education shall disburse
61 the funds appropriated for the Roberta B. Willis Scholarship program
62 not later than May first annually for grants to be awarded during the
63 following fall semester and not later than November first annually for
64 grants to be awarded during the following spring semester.

65 (c) The Roberta B. Willis Scholarship need and merit-based grant
66 shall be available to any eligible student at any public or independent
67 institution of higher education. The Office of Higher Education shall
68 determine qualification for financial need based on [family contribution
69 prior to July 1, 2024, and, on and after July 1, 2024, based on] the student
70 aid index and qualification for merit based on either previous high
71 school academic achievement or performance on standardized
72 academic aptitude tests. The Office of Higher Education shall make
73 awards according to a sliding scale, annually determined by said office,
74 up to a maximum [family contribution or] student aid index and based
75 on available funds and the number of eligible students who qualify for
76 an award. The Roberta B. Willis Scholarship need and merit-based grant
77 shall be awarded in a higher amount than the need-based grant
78 awarded pursuant to subsection (d) of this section. [, except for the
79 academic year commencing July 1, 2024.] Recipients of the need and

80 merit-based grant shall not be eligible to receive an additional need-
81 based award. The order of institutions of higher education provided by
82 an eligible student on such student's Free Application for Federal
83 Student Aid shall not affect the student's qualification for an award
84 under this subsection. The institution of higher education in which an
85 eligible student enrolls shall disburse sums awarded under the need and
86 merit-based grant for payment of such student's eligible educational
87 costs.

88 (d) The Roberta B. Willis Scholarship need-based grant shall be
89 available to any eligible student at any public or independent institution
90 of higher education. The amount of the annual funds to be allocated to
91 each institution of higher education shall be determined by its actual
92 full-time equivalent enrollment of eligible students with a [family
93 contribution or] student aid index during the fall semester of the fiscal
94 year two years prior to the grant year of an amount not greater than two
95 hundred per cent of the maximum [family contribution or] student aid
96 index eligible for a federal Pell grant award for the academic year one
97 year prior to the grant year. Not later than July first, annually, each
98 institution of higher education shall report such enrollment data to the
99 Office of Higher Education. Not later than October first, annually, the
100 Office of Higher Education shall (1) publish such enrollment data on its
101 Internet web site, (2) notify each institution of higher education of the
102 proportion of the annual funds that such institution of higher education
103 will receive the following fiscal year, and (3) publish the proportions for
104 each institution of higher education on its Internet web site.
105 Participating institutions of higher education shall make awards (A) to
106 eligible full-time students in an amount [up] equal to four thousand five
107 hundred dollars, and (B) to eligible part-time students in an amount that
108 is prorated according to the number of credits each student will earn for
109 completing the course or courses in which such student is enrolled, such
110 that a student enrolled in a course or courses earning (i) at least nine but
111 less than twelve credits is eligible for up to seventy-five per cent of the
112 [maximum] award amount for a full-time student, and (ii) at least six
113 but less than nine credits is eligible for up to fifty per cent of the

114 [maximum] award amount for a full-time student. Each participating
115 institution of higher education shall expend all of the moneys received
116 under the Roberta B. Willis Scholarship program as direct financial
117 assistance only for eligible educational costs.

118 (e) Participating institutions of higher education shall annually
119 provide the Office of Higher Education with data and reports on all
120 eligible students who applied for financial aid, including, but not
121 limited to, students receiving a Roberta B. Willis Scholarship grant, in a
122 form and at a time determined by said office. If an institution of higher
123 education fails to submit information to the Office of Higher Education
124 as directed, such institution shall be prohibited from participating in the
125 scholarship program in the fiscal year following the fiscal year in which
126 such institution failed to submit such information. Each participating
127 institution of higher education shall maintain, for a period of not less
128 than three years, records substantiating the reported number of eligible
129 students and documentation utilized by the institution of higher
130 education in determining qualification of the student grant recipients.
131 Such records shall be subject to audit or review. [For the academic year
132 commencing July 1, 2024, the Office of Higher Education shall (1) not
133 require participating institutions of higher education to reduce the
134 amount of a need-based grant awarded to an eligible student based on
135 the initial qualifications determined from such student's Free
136 Application for Federal Student Aid, even if the United States
137 Department of Education subsequently revises such qualifications, and
138 (2) deem a participating institution of higher education to be in
139 compliance with this section if such initial qualifications qualified an
140 eligible student for the need-based grant that such student was
141 awarded.] Funds not obligated by an institution of higher education
142 shall be returned by [May] April first in the fiscal year the grant was
143 [made] to be awarded to an eligible student to the Office of Higher
144 Education for reallocation for the next fiscal year. Financial aid provided
145 to eligible students under this program shall be designated as a grant
146 from the Roberta B. Willis Scholarship program.

147 (f) The Roberta B. Willis Scholarship Charter Oak grant shall be
148 available to any eligible student enrolled in Charter Oak State College.
149 The Office of Higher Education shall allocate any funds to Charter Oak
150 State College to be used to provide grants for eligible educational costs
151 to eligible students who demonstrate substantial financial need and
152 who are matriculated in a degree program at Charter Oak State College.
153 Individual awards shall not exceed a student's calculated eligible
154 educational costs. Financial aid provided to eligible students under this
155 program shall be designated as a grant from the Roberta B. Willis
156 Scholarship program.

157 (g) In administering the Roberta B. Willis Scholarship program, the
158 Office of Higher Education shall develop and utilize fiscal procedures
159 designed to ensure accountability of the public funds expended. Such
160 procedures shall include provisions for compliance reviews that shall be
161 conducted by the Office of Higher Education on any institution of
162 higher education that participates in the program. Commencing with
163 the fiscal year ending June 30, 2015, and biennially thereafter, each such
164 institution of higher education shall submit the results of an audit done
165 by an independent certified public accountant for each year of
166 participation in the program. Any institution of higher education
167 determined by the Office of Higher Education not to be in substantial
168 compliance with the provisions of the Roberta B. Willis Scholarship
169 program shall be ineligible to receive funds under the program for the
170 fiscal year following the fiscal year in which the institution of higher
171 education was determined not to be in substantial compliance. Funding
172 shall be restored when the Office of Higher Education determines that
173 the institution of higher education has returned to substantial
174 compliance.

This act shall take effect as follows and shall amend the following sections:		
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Section 1	<i>July 1, 2025</i>	10a-173
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Statement of Purpose:

To require (1) need-based grants under the Roberta B. Willis Scholarship program to be equal to four thousand five hundred dollars per student, and (2) the Office of Higher Education to disburse grants under the Roberta B. Willis Scholarship program not later than the academic semester preceding the academic semester in which such grants are to be awarded to eligible students.

[Proposed deletions are enclosed in brackets. Proposed additions are indicated by underline, except that when the entire text of a bill or resolution or a section of a bill or resolution is new, it is not underlined.]

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S.B. 5